PROJECT in a box
"Your own Project Support Office"

PROJECT in a box
Version 3.4.1

User Guide

Guide version 1

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Introduction to the system and architecture

Introduction to PROJECT in a box 3.4.1

PROJECT in a box (PIAB) is an enterprise level project management system, PIAB has been developed to help organisations manage, control and share their project information consistently amongst their distributed teams and in turn improve their project performance.

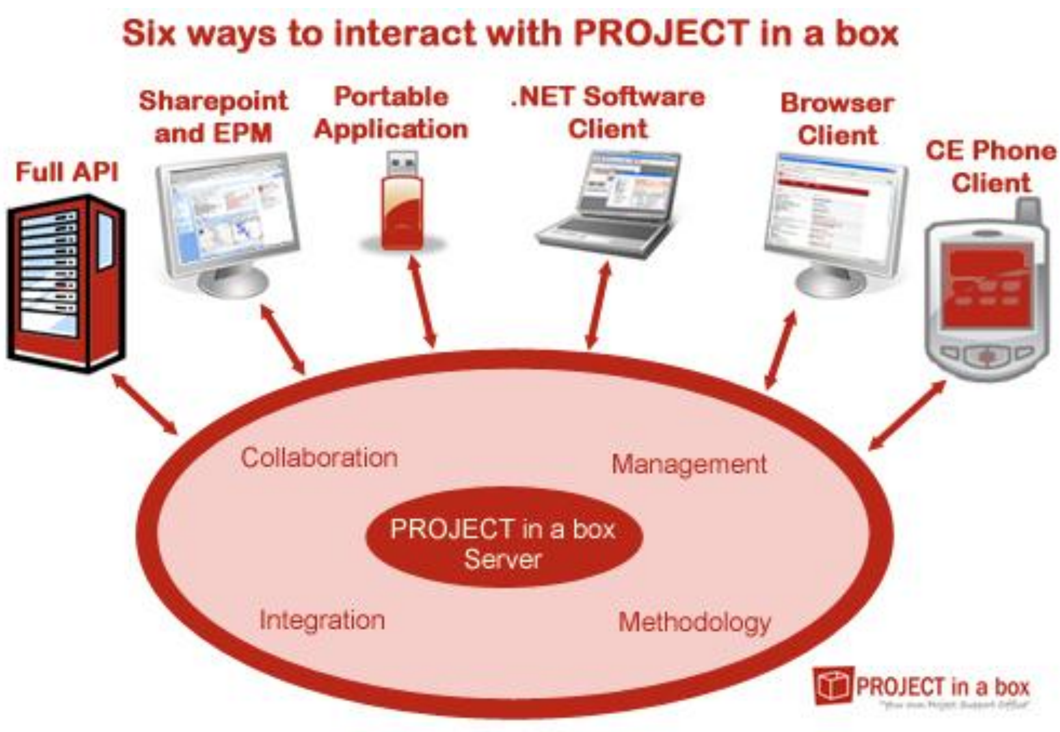
PIAB has a number of underlying assumptions and principles that it is important to understand:

- The organisation's PM culture will be process based
- The organisation's project team members will have sufficient understanding of the process to use it as a navigation aid
- The project related information is contained or provided in a set of electronic files
- Only one user should work on a particular file at any time although many users may view it for information.
- Employees are generally given a consistent level of access to all information held for each project but may be given different level of access on each of the projects, including no access. These general permissions levels can be specifically altered on a document by document level.

This means that users are provided an easy to use window on their project documentation and enables them to view content as well as check it out, work on it and then add it back into the system later. This approach offers much more control and context over the way organisations manage their project documentation in the silos of personal hard drive file storage.

The architecture of PROJECT in a box

PROJECT in a box is best understood as a client server system, all the documents and project data is stored on a central server. Users can connect to the server from a client locally on their computer or via a browser interface. Connection between the client and the server is all made via web services and this enables the client software to connect to the server over a company network as well as the internet.



Two types of Clients are available:

1. The .NET rich client (The software client), which can be operating in two modes:
    a. Manager licence mode – full functionality including admin functions and management reporting
    b. Team licence mode – full project working functionality except reporting and administration.
2. The Enterprise Hub (The browser client) is a browser based simple client which can be operated from a browser on a computer as well as on a smart phone or portable device.

Neither client can be operated independently and must have connection back to a server to be able to access the projects located on that server. In addition a standalone .NET application called Planner is also provided for managing plans, risks and issues used in projects, it is packaged into the .NET software client and available to deploy from the browser client.

A facility also exists to auto check in files to the server which are routinely produced by external systems/applications such as finance systems.

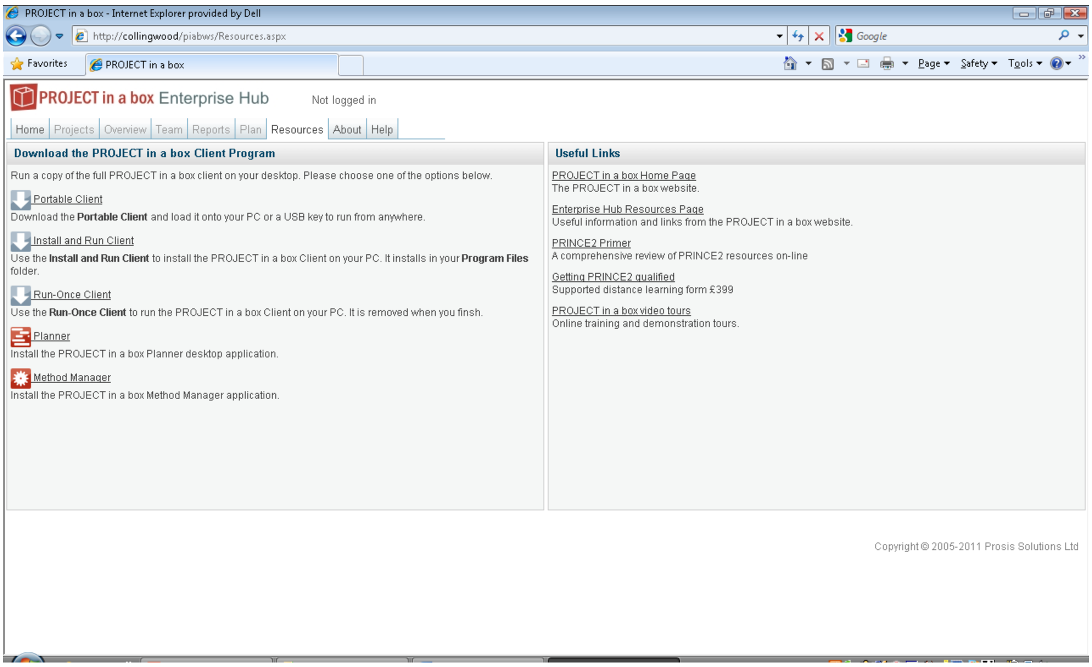
Deployment of the .NET rich client

The Client itself is not licensed and can be installed in as many locations as required to provide user access. To install and operate the client successfully the following are required:

- A windows PC (2000, XP, Vista or Windows 7) with a network or web connection to the server
- A local installation of the .NET framework version 2.0 or newer

If the host PC has the above then the client can be installed and operated by a user without having to use local admin permissions (i.e. without having to contact IT support). The user just visits the Resources page which is a standard part of the Enterprise Hub, hosted on the server (as shown below) and decides which type of client installation is preferred:

1. Run-Once – unpacks and operates the client from the local PC, when the client is closed it removes the client.
2. Install to PC – unpacks and installs the client. The client persists after closure and will remain on the PC for use in the future. (requires Admin permissions on the PC)
3. Portable client for USB stick – provides a client which can be unpacked onto a USB stick and moved from one host computer to another whist taking all files and local working materials with it.



Irrespective of the deployment mode chosen the same client is used and its functionality (Manager or Team) is determined by the licence associated with the user who logs on to the client.

The Enterprise Hub browser based client

This requires absolutely no install on the local PC of the end user - all the content is served from the server and the user just requires a Browser (IE, Firefox or Safari are most common). The functionality provided is a subset of that provided in the client supporting file management, reporting and team communications depending on the user's permission and licence. This provides for quick and easy access to core project team members away from their desk, from a Mac or Linux machine and a wider project community as required.

The Process or Method

PIAB is provided as standard with a set of Method templates based on standard methods including PRINCE2, Agile and PMBOK, for PRINCE2 the method is also pre scaled meaning projects can be created and managed in accordance with PRINCE2 for projects at varying levels of complexity (Complete, Basic or Access). PIAB is also provided with a method for managing Opportunities and producing proposals in response to these and a Lessons Learned Library method to support best practice in this area. Other methods including MSP and ITIL are available as commercial extensions.

If required users can modify these method templates, copy and modify or create entirely new method templates for different types of methodology or other documented process driven activities.

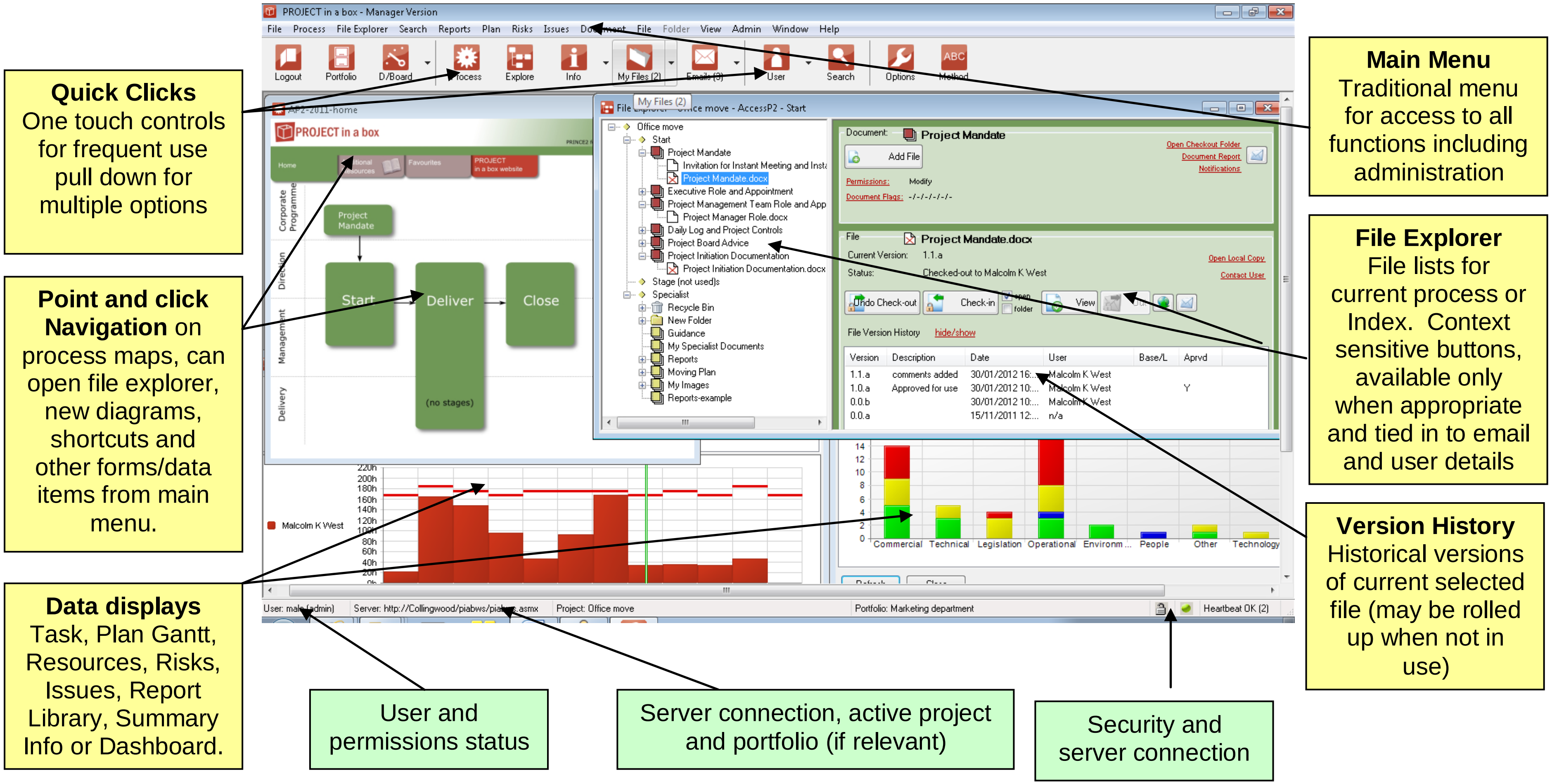
PIAB can accommodate an unlimited number of these method templates which can then be selected from when a new project is being created within the system. The method template used to create the 'project' determines the process images used, process menus, click areas and actions and the documents and file presented and where they are recommended/presented in the process, as well as alias names, stage status flags and other areas of the system. So this will account for the difference in structure, look and content of the system when a project is being run to one method rather than another.

A summary of the standard methods provided with version 3.3 is provided at the end of the User Guide.

System Basics

The .NET Client Interface

The Client interface consists of several menu layers at the top a main active area in the centre where project windows can be opened and a status bar at the bottom providing connection, security and current context information. These controls behave in the conventional Microsoft manner with single, double and right clicks. Key board short cuts are provided for accessing the help file (F1) and the optional P2 Guidance Module (P2GM) when installed (F2).



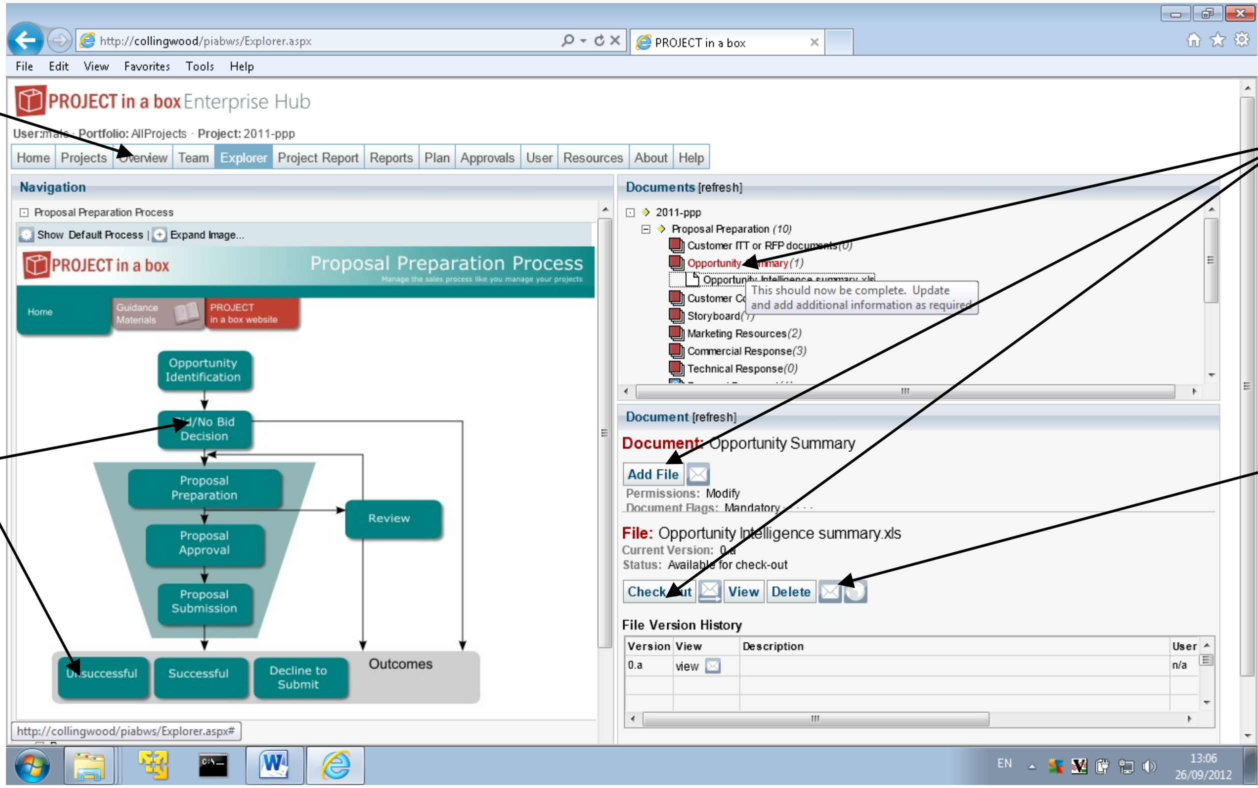
Enterprise Hub Browser Client

The Enterprise Hub is simple and quick to access and use and provides the basics of viewing the most recent files, team comms and other capabilities under the control and permissions set for that user on the project.

Main Menu
For moving between the main pages on the Hub

Project Navigation
Select how you want to navigate the project, by process, index or search.

Unpack the process and documents to access the files you need.



Document management capability to match the .NET client. View, check out and in, add new content view historical versions.

Email capability enables you to send emails from the browser interface whatever your normal email software and sends a copy to your home account for completeness.

Planner

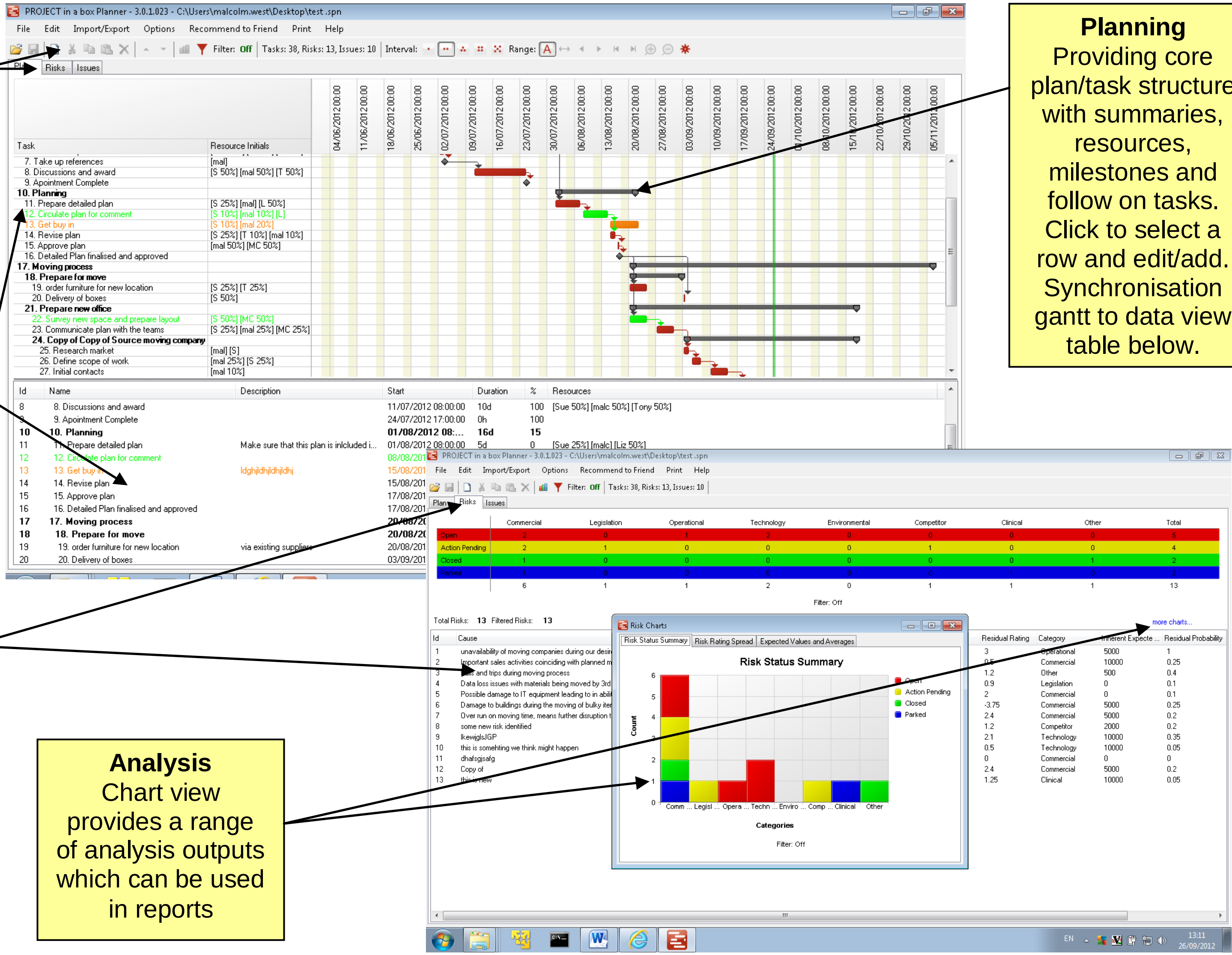
Main Menu
Tabbed arrangement to swop between Plan, Risks or Issues.
Context menus

Summaries
Unlimited size and summaries structure, can be collapsed and opened as required

Risk and Issue
Data view for managing an sorting items and responses, use filters, ordering and export options.

Analysis
Chart view provides a range of analysis outputs which can be used in reports

Planning
Providing core plan/task structure with summaries, resources, milestones and follow on tasks. Click to select a row and edit/add. Synchronisation gantt to data view table below.



Permissions

The table below presents some of the key actions that the system allows a user to take depending on their permissions granted for **<u>that particular project*</u>**.

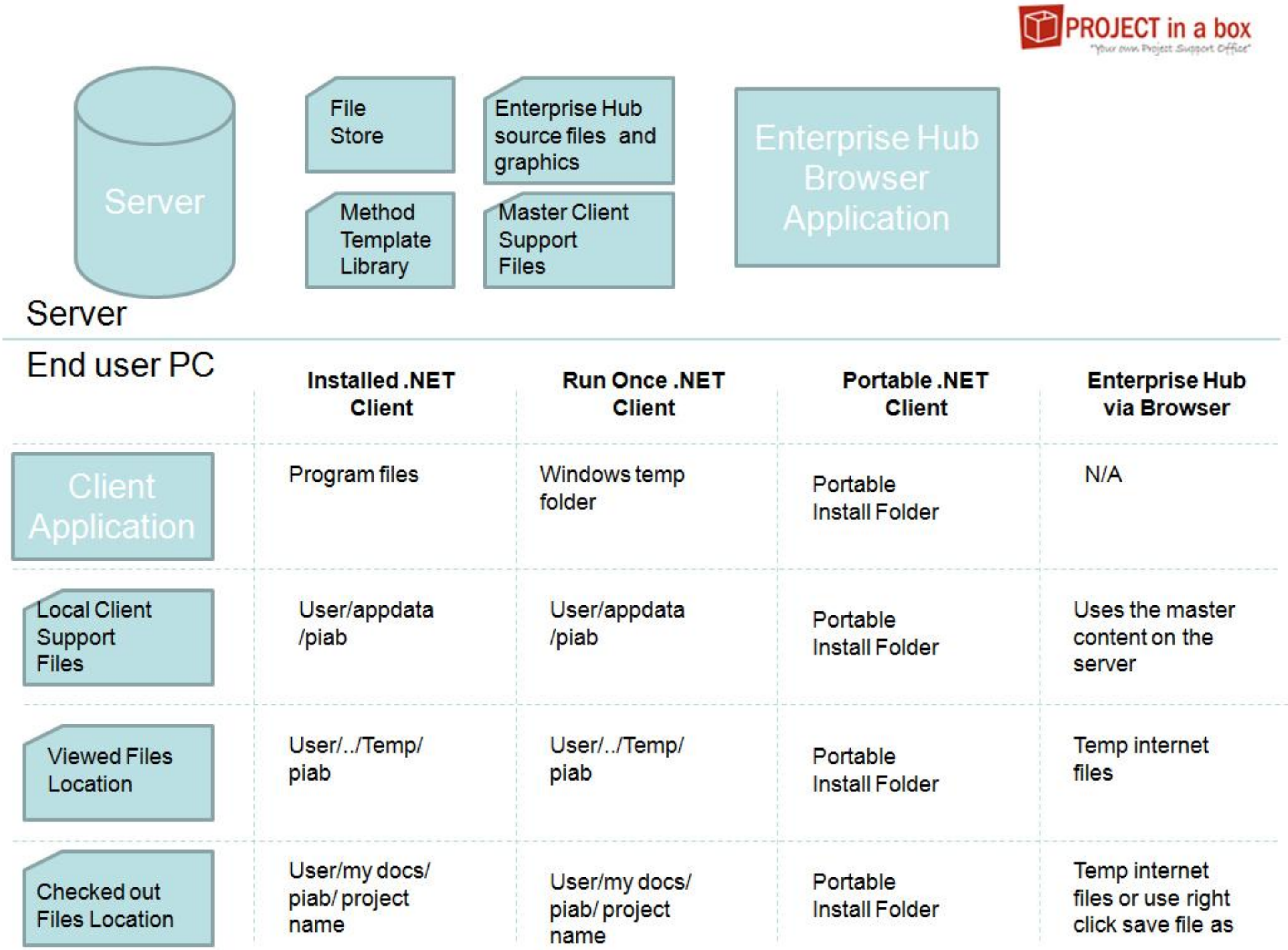
	No Access	Read	Read /Write	Modify	Portfolio	Admin
User can access own my details and team details	X	X	X	X		
User is shown the project exists		X	X	X		
User can open the project		X	X	X		
user can view any file*		X	X	X		
User can view their own tasks as list or Gantt		X	X	X		
User can be invited to approve a file		X	X	X		
User can check in/out any files*			X	X		
User can add new files or links to an existing document*			X	X		
User can add new documents and folders and share documents between projects*				X		
user can reorder or delete files, documents and folders*				X		
User can rename objects*				X		
User can set up Notifications on documents or tasks *				X		
User can alter the permissions (project and document level) of users on the project *				X		
User can initiate a file approval request				X		
User can alter project summary information				X		
User can edit document hints text				X		
User can assume some admin capabilities on this particular project				X		
User can operate reports at a project level*				X		
User can operate risks, issues, tasks, plans and resources at a project level						
User can administer projects (permissions and stages)				X		
User can operate portfolios and portfolio reports					X	
User can operate tasks, plans and resources at a Portfolio level					X	
User can use activity reports on all projects and all users				?		X
User can add new stages and projects				?		X
User can add new users and grant Admin or Portfolio permissions				?		X
User can assign licences to users				?		X
user can administer users or alter permissions				?		X

Notes:

- Red cross (X) and text indicates only available from a Manager client
- * where document specific permissions are not set, if these are adjusted then a particular user may have additional or reduced capability depending on the permissions level on the document in question
- ? Admin and portfolio permissions can be delegated to users with a Manager licence either in preset blocks or one capability at a time.

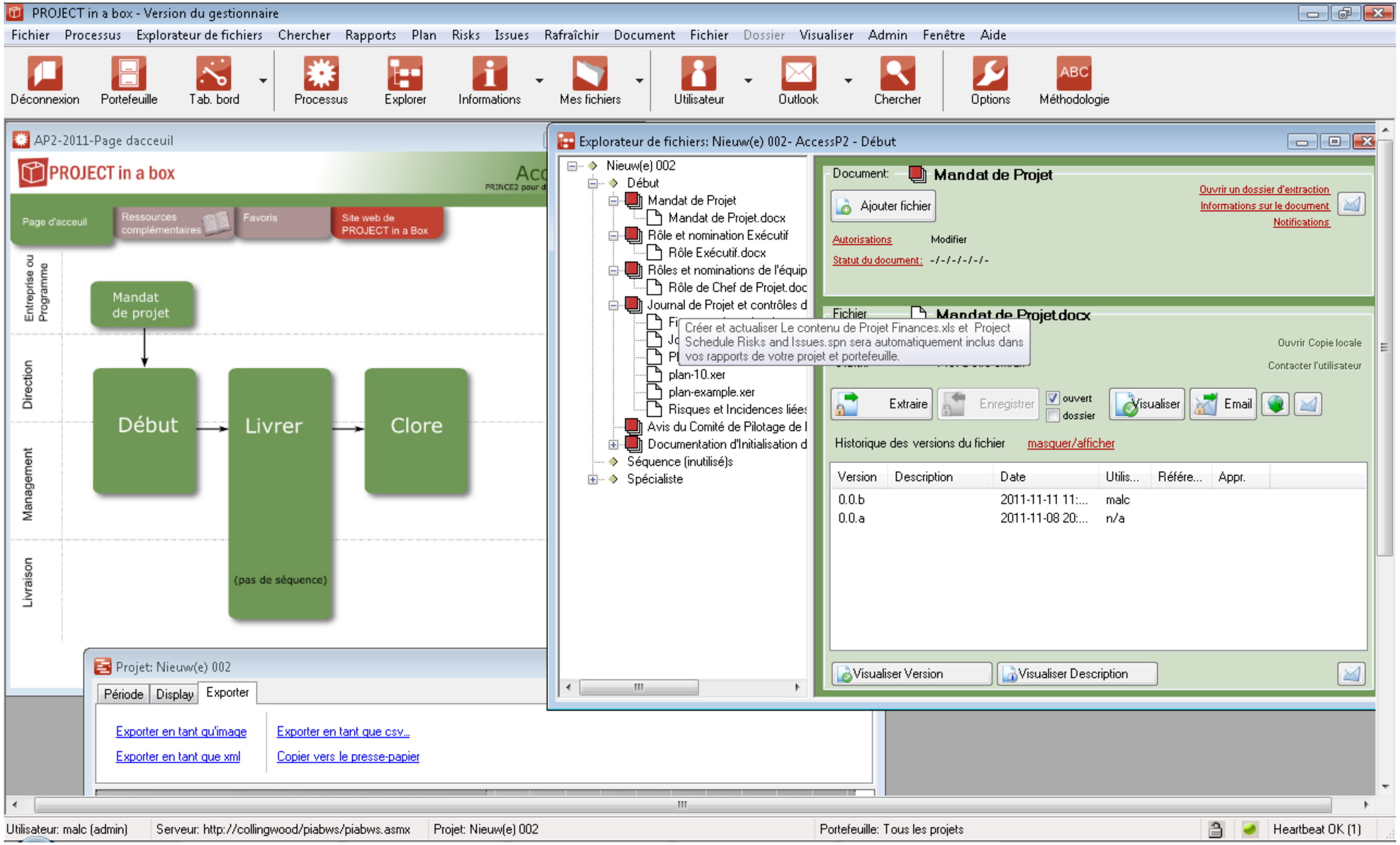
The users permissions are set up at the manage users/project permissions form found under the administration account. You can set up as many accounts as you want and then grant each user permissions on a project by project basis. Admin or Modify users can also set up named Custom permissions groups on the project, which default to one of the normal Read, Read/Write or Modify groups but could then be tailored to raise or lower the permissions associated with specific documents to tailor access for a particular user type, such as a Customer or sub-contractor, in a particular project.

Locations and Resources



Languages

PROJECT in a box is multi-lingual. This is delivered in two parts, firstly the method template which controls the language used in the process diagrams, template files and tree structure including doc flags, guidance hints and tips. The method template can also provide its own terms for project roles, extended properties and statuses and therefore provide them in a different language. The application also has a language capability for the interface which controls the buttons, menus and application driven content such as messages and some of headings and materials in output reports. The software client checks the host computer's regional settings for language and if it has a language file for that language it uses it, if not it defaults to English. A language can be forced using the setting in the User Options form. The Browser client is similar using whatever language is set in the browser options.



.NET Client Functionality Factsheets

Accessing the system

Overview

The system is accessed from a piece of client software located on each user's computer. This client communicates the user's requests and instructions to the central server where these are carried out, files returned etc. When accessing the system the first time you will need to:

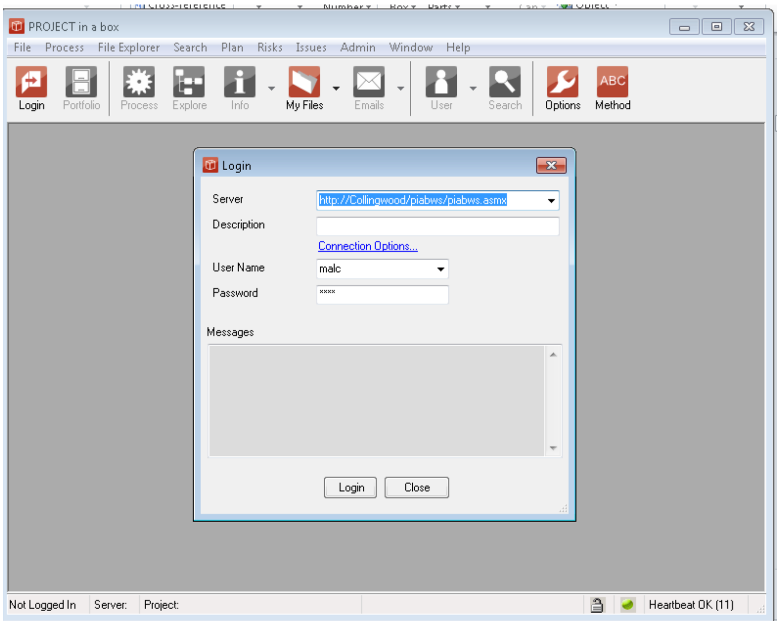
- have had the software deployed to the computer;
- know the address or name of the server you are trying to connect to and
- have a user account already created (and know the name and password).

If you don't know this your system administrator should be able to provide you with answers.

Steps

1. Start the application from the desktop icon, the Start menu, or from the deployment page.
2. Wait for the flash screen to pass (and if your first operation you will also see the getting started guide screen)
3. Select or add the address for the required server to connect to from the available list
4. Enter your username and password (unless using Active Directory authentication in which case username/password will be greyed and windows account will have been picked up)
5. Press Login
6. Wait while the web services connections are made
    a. if successful the status bar and Quick clicks menu will become active
    b. If unsuccessful messages will be provided with the reasons in the server messages window

Screens



Notes

The most common reasons for failure in logging on are:

- Incorrect server address (check with system admin)
- Lack of connectivity to the server (no network or web connection, server IIS or PIAB PWS not running)
- Spelling errors in username and passwords

If set in your personal options the system can remember the different user accounts used to access the system from that install, making changing accounts or sharing usage of the same client easier.
If you cannot login you can still access the help and user options quick clicks, also your checkout, temp and reports folders via the Main menu file option. You can also access your connection settings using the 'Advanced connection options' link or start the Personal webserver (if it isn't running) using the relevant link on the login form.

Using the help

Overview

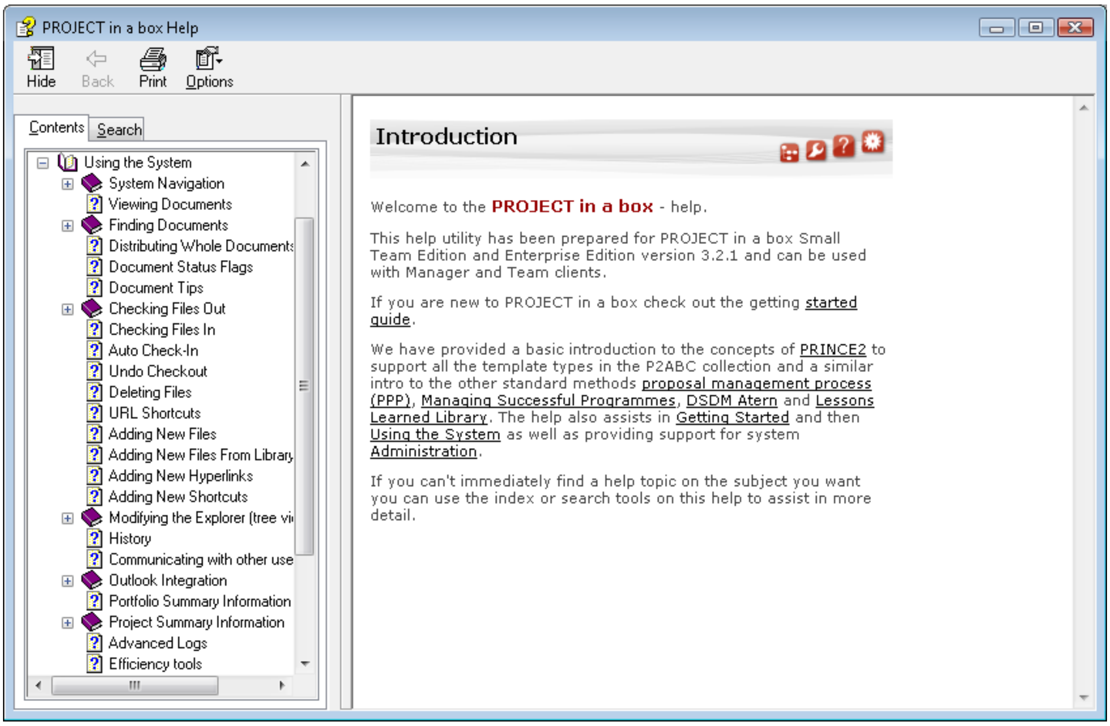
A help utility is provided which covers all functions supported by the system and also gives basic PRINCE2 terminology information and contact details for the PROJECT in a box support desk.

The help has a full index and the provided search tab supports full keyword searching within the help utility.

Steps

1. Help is available prior to log in to support accessing the system if required.
2. Help is accessed from the Help on the quick click menu or Help on the Main menu and opens in a separate MS help window.

Screens



Notes

If you can't quickly find what you want using contents or the index then use the key word search.

A getting started guide is also included within the Help file; use this to provide a step by step guide through the first steps of using PIAB.

Help can also be activated by pressing F1 anywhere in the system and the most relevant page will open, you can then browse off to other help pages as required. This is known as context sensitive help.

Navigating between projects

Overview

Your system may have any number of projects but it is likely that you will only have permission to access or work on a relatively small number at any particular time.

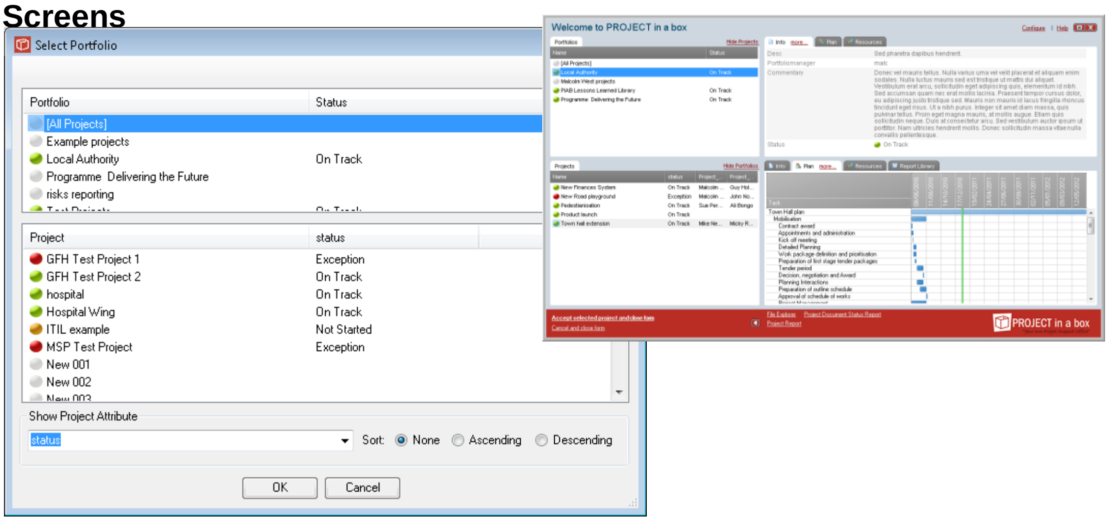
You must always have a ‘current’ project open so the first window offered when you login allows you to select your project from either a portfolio you have permissions to see or the automatically generated all projects list. Your status bar at the bottom of the application will show you which project you are currently in and what general level of permissions you have for that project. Alternatively the Dashboard can be used to select your portfolio and project.

To access files, review status, report and undertake any other functions on a particular project that will need to be your current project. Switching between projects is straight forward.

Steps

1. Use the Project Quick click icon or use the select project option from Main Menu – File to bring up the Select Project form. This is the default form the system will show you when you first log in.
2. To select a portfolio or then a project click on its name in the list or single click and press OK.

Screens



Notes

During this process you can choose to display any available attributes (only Manager Licence users) against the projects to provide further information or help you decide which to view. If you select ‘status’ the standard RAG colours will also be displayed and may be displayed for other attributes if these have been defined.

When a new project is created, all users automatically get ‘no access’ permissions set (except the user who created it, who gets modify) meaning that they cannot even see the project exists and it won’t appear in their Project list. If you expect a project to be in your list but it isn’t, you probably have ‘no access’ set, contact your system administrator telling them the project name and they can adjust this for you if it is appropriate to do so.

If you are a Portfolio user, you will have your available portfolios showing in addition to the all projects list. When selecting a project your normal route will be first to pick a portfolio then to pick a project within it (as in above right). When operating in Portfolio mode both your current Portfolio and current project are displayed in the footer. You can alternatively pick any project (you have permissions for) from the all projects list.

If you are the Admin user you automatically see all projects in your all projects list (irrespective of your permissions on each specific project) even if you have a no-access permission to access them. If you need to access them to undertake your admin role grant yourself permissions using the Manage Permissions by Project form.

Project or Portfolio Summary Information

Overview

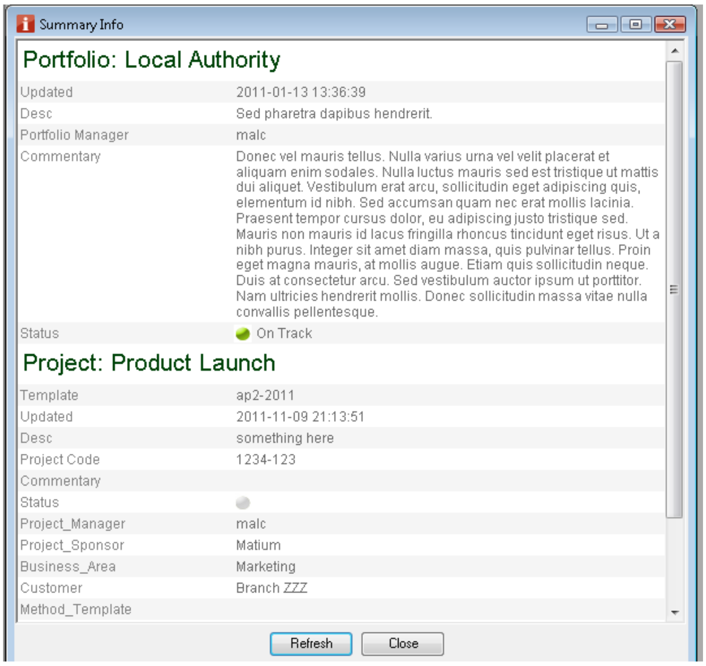
A summary information form is available within the main project working space to display details of the current project or project and portfolio selected by the user.

This form displays information which the method template has specified for collection on the Project and a predefined basic set for the Portfolio level and is the data which would be displayed in Project and Portfolio reports.

Steps

1. If the active area is blank click on the **I** icon in the quick clicks menu to open the Summary information form. Alternatively this can be accessed from the main menu -> admin -> view summary information.
2. If you have permissions to edit the Summary information at either the project or portfolio level the edit can be undertaken from the side menu next to the info icon on the quick clicks menu
3. The Summary **I**nformation form may be minimised, closed or refreshed like other project forms.

Screens



Notes

This information can also be displayed as one of the active information panes in the right side of the Dashboard

Navigating the processes within a project

Overview

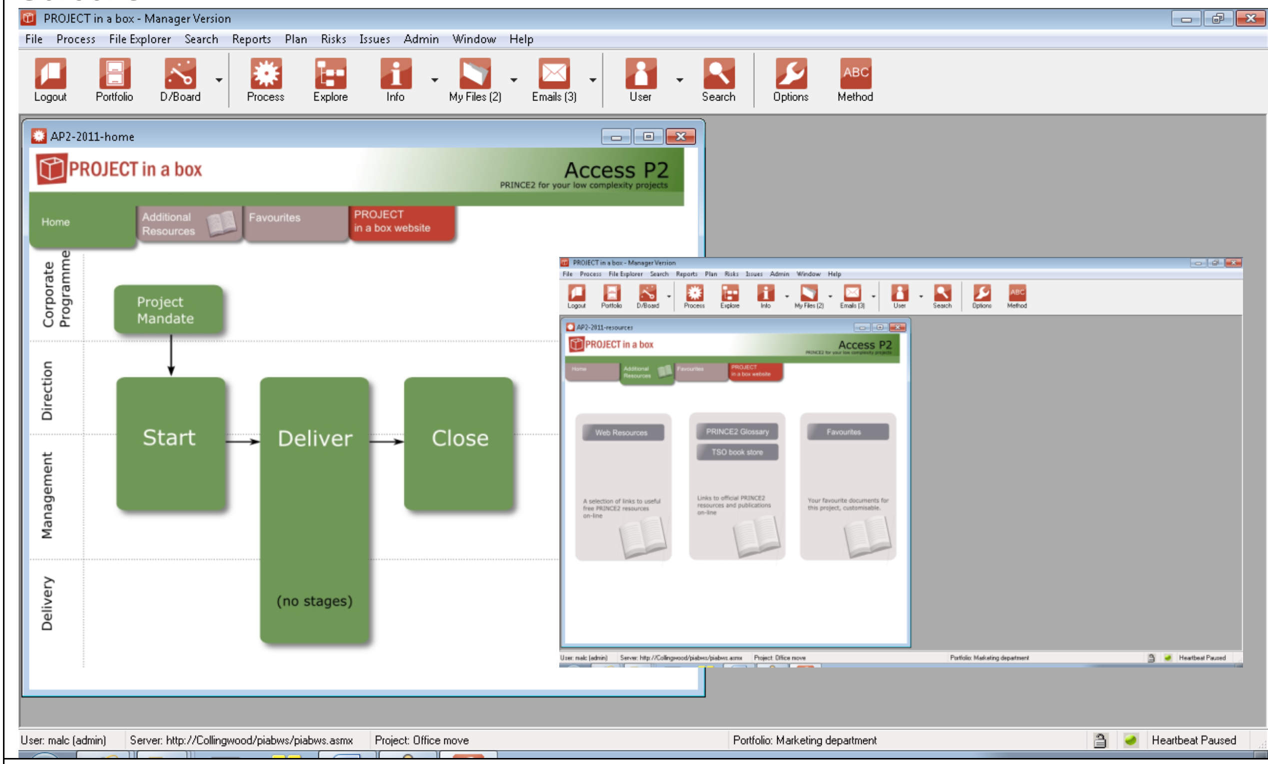
Navigation through the processes is usually point and click using the process diagrams for your current project. A menu is also provided from 'process' in the main menu. When you open a project it will remember the configuration (location and size) of the diagrams you had open with you last left the project to help you remember where you left off.

Depending on your method set up a navigation click may open file explorer, web shortcut, another navigation diagram or an active part of the application. Also note that the method may contain rules to show different navigation options to different users based on permissions or on project property values.

Steps

1. If the active area is blank click on process diagrams in the main menu or select a project using the quick clicks menu icon (project or portfolio) to bring up the main process diagram.
2. If an area of the process diagram is activated for a point and click navigation action the cursor changes from pointer to hand enabling you to click if you wish. Depending on the instruction for the particular click area held in the Method Template one of four results can occur:
   a. A different process diagram will then open in the process window;
   b. The File Explorer will open in the active area (or return to the top if already open);
   c. A webpage or windows shortcut destination file/location will be launched over the top of PIAB.
   d. A data view or active management form may be opened.

Screens



Notes

Your options allow you to switch between Single pane navigation where new diagrams replace/overlay the old ones (default and recommended for all 2011 style methods) or to allow new images to open in their own window which is more appropriate for the older method templates. If required process windows can be minimised, closed or resized. If closed a new one will open when an appropriate click is made. If minimised you will need to reopen the window to progress navigation.

Remember the process diagrams and process menu lists may be very different between different project types due to the nature of the method template applied so they may not look like the Complete PRINCE2 method used mostly in this guide. If all process windows are closed you can use the process quick click to open the main process window or the 'process' main menu item to access a particular window.

If the result was a Windows or Internet shortcut PIAB is now in the background and you are operating in the new application without any reference back to PIAB. To return to PIAB close or minimise the application or bring PIAB back to the top by clicking it in the desktop system tray.

Using the File Explorer form

Overview

The File Explorer form is the location from where most operations in the system are undertaken and is your window on the sub-process. The form consists of two main parts. The document tree which resembles a Microsoft explorer form shows the file structure and is located in the left pane of the form. This shows all the documents recommended for the current sub-process.

The right side of the form is the document pane which becomes active when you click on (or in) a document in the document tree. It provides all the detail about the individual document and files contained within it as well as simple access to information and functionality associated with them. (Colours in the document pane may vary with Method template).

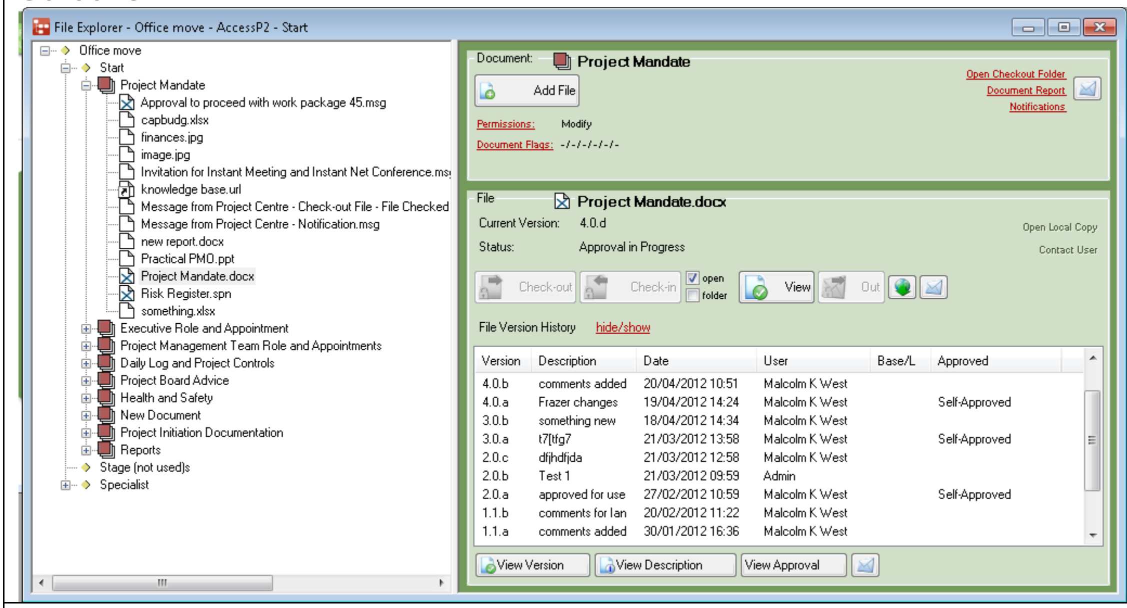
Although conceptually two panes within the form they work as one. So changing the focus in the document tree (clicking on a different part of the tree) changes what is shown in the document pane and changes triggered in the document pane are automatically reflected in the tree. The File explorer only refreshes automatically when you undertake an action, to force a refresh with latest information from the server use the ‘Refresh Tree’ link.

Steps

Covered separately for individual functionality available from the form.

The File explorer can be refreshed using the main menu item.

Screens



Notes

For more detail on how to use the functions located on the form check these guide sheets:

- Document tree navigation
- Document specific permissions
- Status flags
- View current files
- Save local copy
- View historic files
- Check file out (local and to message)
- Check file in (local and from message)
- Request File Approval
- Add new Library template
- Add new file
- Add new Internet Shortcut
- Add new Windows shortcut
- Recycling a file
- Deleting a file
- Undo Check out
- Contact a user
- Modify the project structure
- Process Properties
- Order documents in the process
- Sharing documents between projects
- Outlook Integration
- Managing Notifications
- Document Report

Document tree navigation

Overview

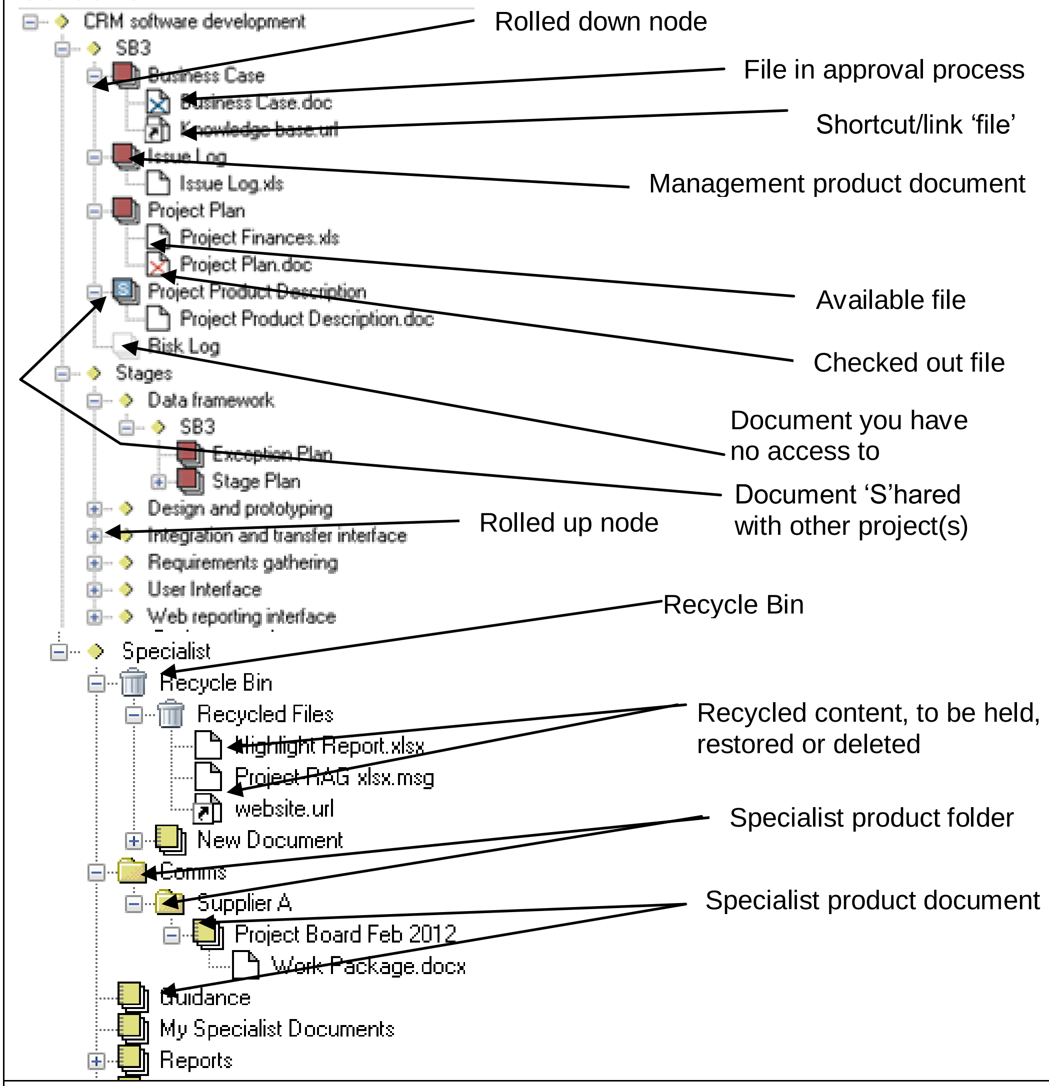
The Document tree provides a very flexible way to see lots of structured information about the documents associated with the project. By default it will show the user the management products that should be produced or reviewed for the current PRINCE2 sub process (or other method as appropriate for the project type as indicated at the top of the tree). And is structured into major sections of project level documents, stage documents and specialist products.

The process view can be changed to an alphabetic list of documents available under each heading by ticking the document index view box above the document tree. Some method templates are populated with document tips, hover over the document to read the guidance.

Steps

1. All structure can be rolled up and down, the tree node indicates the current roll status
2. A right click on any icon in the tree provides a menu of functions permitted for the user on the item
3. A red cross on a file indicates the file is currently checked out

Screens



Notes

If no stage documents are shown when a stage is unrolled it is likely you are in a process focus and the process does not address stage management products (e.g. SU in PRINCE2) for some smaller project process methods stages may not be used at all. Likewise on some processes like MP3 there may be no project level documents only stage specific documents recommended. The Project, Stage and Specialist Products terms used here and elsewhere may be aliased here by the Method Template and so differ for different project or programme types. The Specialist products are always available in full from the lowest portion of the tree and the same structure is shown here irrespective of the current sub-process selected. For users who prefer menu navigation of functionality the right click functions for the current focus object are also available from the main menu.

Document Specific Permissions

Overview

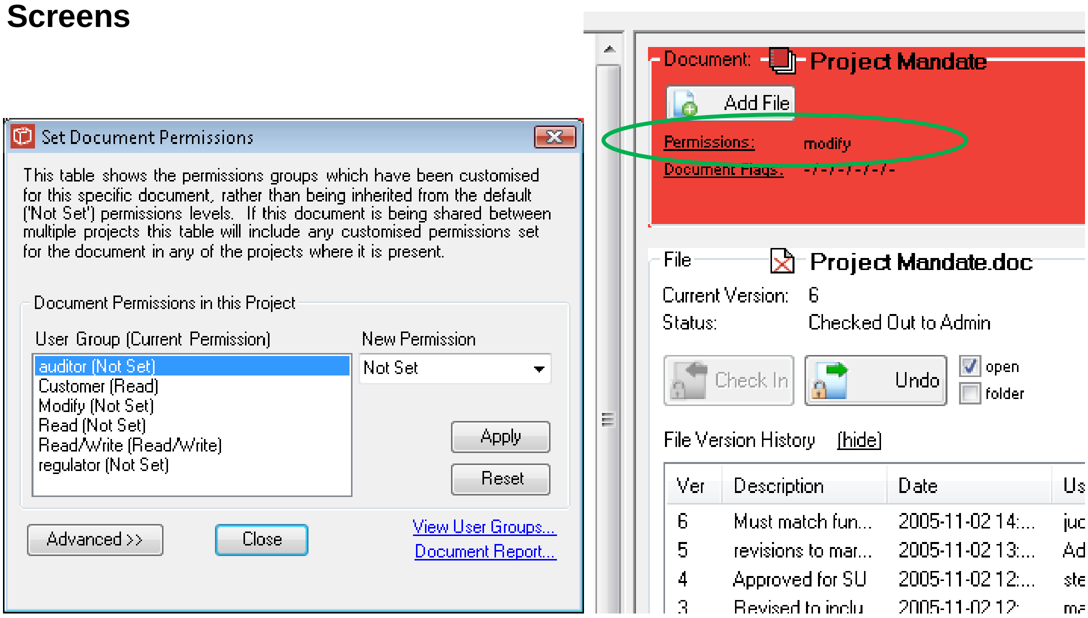
Every user has a permissions group for the current project which is shown in brackets next to their user name in the bottom left corner of the application. These standard groups can be altered on a document by document basis to give all the users in the group a higher or lower level of access to specific documents and the files contained within.

For this reason the user's permission level on the currently active document is shown in the document explorer as Permissions: no access, read, read/write or modify. These **may** differ from your general permission group on the project (shown in brackets next to your user name).

Steps

1. As with any other changes to the permissions model, to change a document specific permission the user must have admin permissions themselves (either as Admin or Modify on the current project). If this is the case the Permissions: title on the document explorer will be shown underlined like a hyperlink, (Colour may vary)
2. Click the permissions link and the Set Document Permissions form will open.
3. Pick the user group you want to alter if it is still at its default permission it will show (not set); otherwise the altered permission level will be shown.
4. Using the New Permission list you can then pick the new permission you want to apply to this document for the defined user group.
5. Press apply to complete the permissions change.

Screens



Notes

The form is shown above in 'simple' format which is appropriate for customising permissions on a normal document. You can run the document report from here (with a Manager licence) to find out more about the Document you are setting the permissions for. The reset button sets all permissions here back to (not set). You can also open the user groups form from here, use this if you want to review which users you will be affecting with a change or to add accustom permissions group to alter access for a limited number of users without affecting the rest.

The Advanced part of the form is provided to deal with when the document is shared with another project. The first pane of the advanced area shows you everywhere on the server where this particular document is included (which projects and process locations). You are then shown the permissions that have been customised at these particular locations. If you want to apply the permissions changes you have made above (for this project) to this document in all the projects it appears in use the 'apply to all projects' button.

If you want to adjust document permissions on multiple documents at the same time use the Manage Documents form instead (see below).

Manage Documents (permissions and notifications)

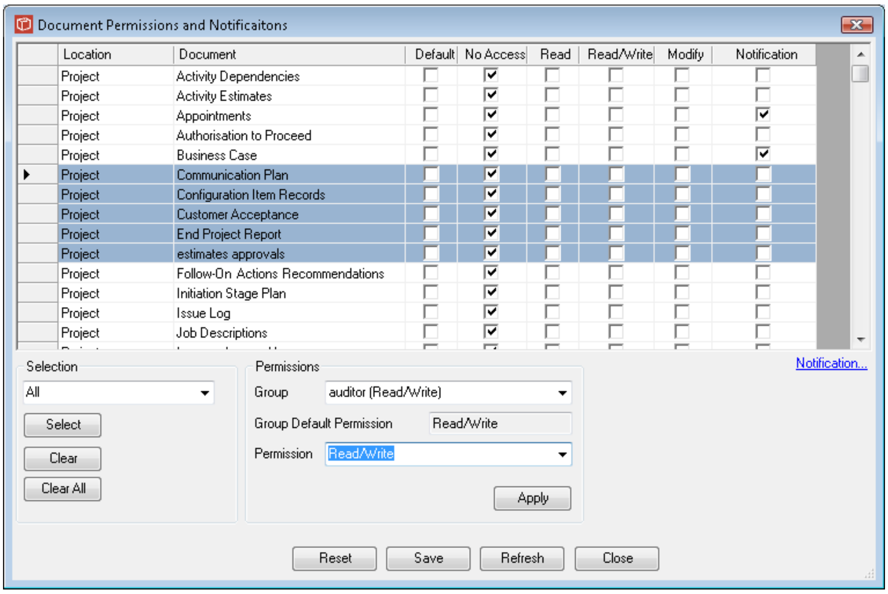
Overview

Sometimes the PM or administrator will want to make significant changes to the document permissions for a permissions group to grant a section of users additional or reduced functionality. Doing this one Document at a time (see case above) is time consuming and doesn't give a good picture of the permissions as they have been granted. This Document Permissions and notifications enables the user with Modify permissions on the project to see how all the doc permissions for the project are set against each user group, to edit these and to review and edit notification settings.

Steps

1. As with any other changes to the permissions model, to change these document specific permissions the user must have admin permissions themselves (either as Admin or Modify on the current project). If this is the case the Manage Documents form will be accessible from the main menu -> Admin menu.
2. Select the Permissions group for which you want to view the permissions and the display are will change to show the current permissions by document for the documents.
3. To make changes:
    a. For specific documents – click in the grey left column to select a row then click on the new permission required then press apply
    b. For a particular set of documents – use the selection pick list to select, all, all project level, all from a particular stage or all specialist, then select the required permission from the pick list and press apply
4. Select a different Permissions group if required and make further changes. Use Save to save changes before exiting the form

Screens



Notes

The form also shows you which documents have notifications set up against them, to view and edit the notification or set up a new one click to select the document (left hand column grey area for that row) and then click the blue Notification... link below.

Using this form it is very quick to set up access to customers or suppliers to have access to small parts of the project. Firstly select all the documents and give No Access, then pick the stage or project documents you want to allow to be accessed and set as read, read/write or modify to suit needs.

Status Flags

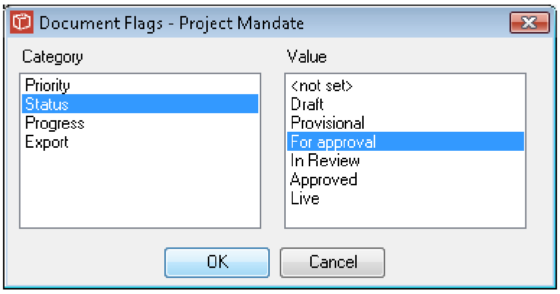
Overview

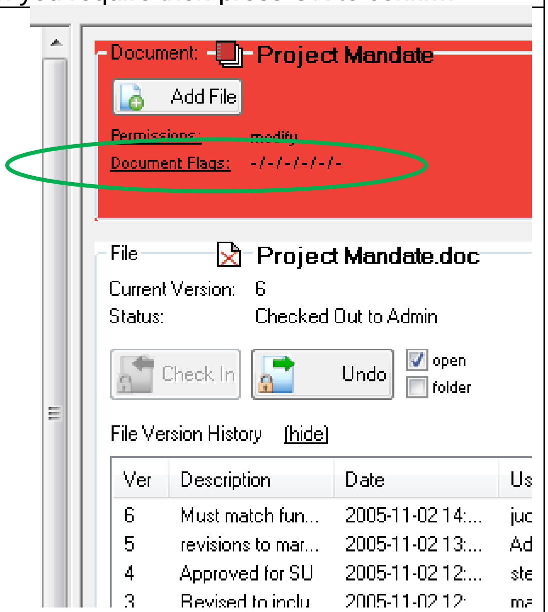
Document status flags provide a quick and flexible way for users to communicate guidance, progress or other codified information about a document. The Document flags can be customised by a client organisation on a server basis, with a form in the Server tool, although the system is delivered with typical settings provided. Each Category of flag has a permission group associated with it so that access is controlled to who can alter it.

Steps

1. If any status flags have been set against the document they will be displayed in the document explorer.
2. If you have sufficient permissions to alter any of the categories of status flag the Document Flags: title with be shown like a red hyperlink, click on this to bring up the Document flags form
3. The Document flags form will display the categories you have sufficient permissions to use. Click on the Category and the associated status options will show in the right hand side pick list. Click the status option you require then press OK to confirm.

Screens





Notes

The Export category is used specifically to identify documents which are to be excluded from an export or from presentation in the Enterprise Hub client.

Up to six categories can be defined and these are managed from the Method Template so different types of projects may have different document status flags.

A method template can include preset flags on documents when the project is created, otherwise a new project will have all flags provided as blank.

View current files

Overview

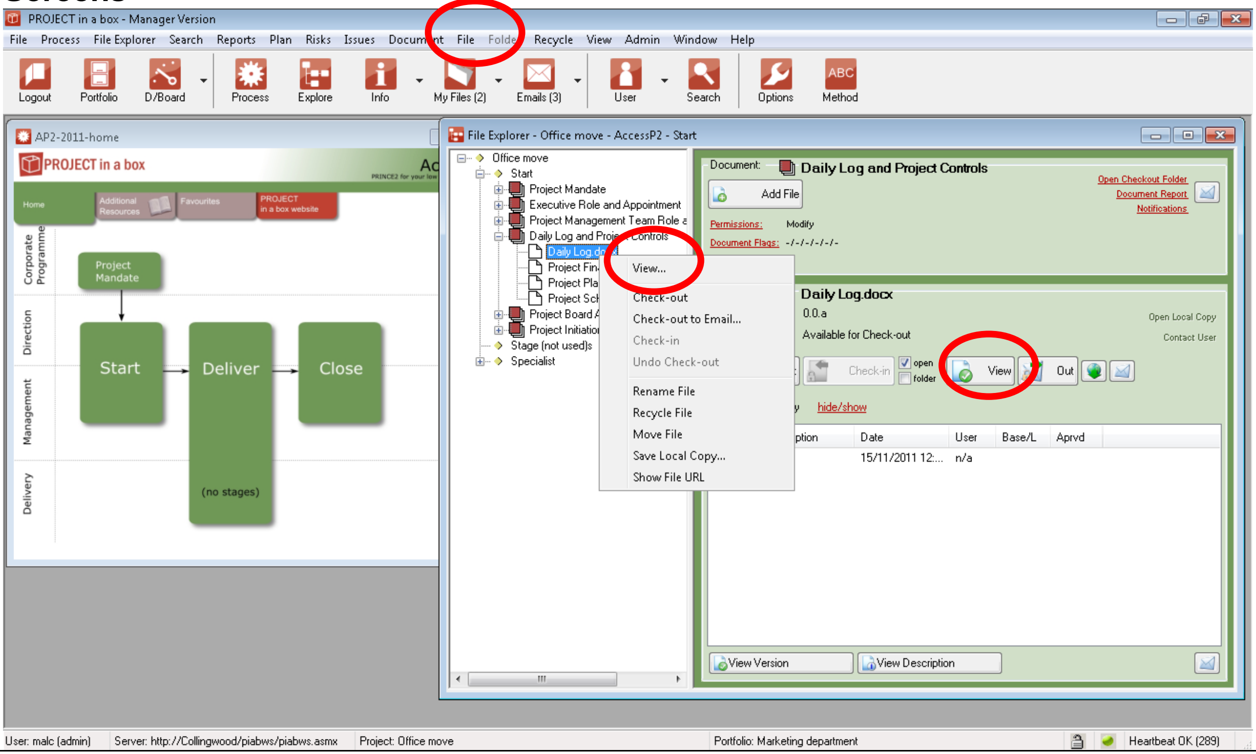
The most common action undertaken in the system is to view the current version of a particular file and this is undertaken from the File Explorer form.

Common reasons are to review a file or to familiarise the user with progress or technical issues associated with the project. Users may view the current version of any file in the system at any time even if this file is currently checked out and being worked on (checked out) by a different user as shown below.

Steps

1. Select the file you are interested in and there are three modes of access:
    a. Double click directly on the file icon
    b. Single click to put the file into 'focus' then click the 'View' button in the document pane (this will be lit to indicate focus)
    c. Use the File Actions – View items in the main menu or on right click from the tree
2. The file will open on your PC using the default package for the file type.

Screens



Notes

Although you have opened the file and could edit it if you wished this is an **UNCONTROLLED COPY FOR VIEW PURPOSES ONLY**. The file will have been placed by the system in your default view/temp folder for the purposes of opening it locally. Depending on your settings for file naming convention the file name may include the (view) element and it may have been provided with the windows read-only property set.

The opening actions as discussed here relate to files that are controlled, versioned and updated via the system, which will be the majority of your project files. Some of the 'files' thought will be internet or windows shortcuts. With these 'files' the system stores a link to the thing (webpage or something located on the user's PC such as a policy document or template) rather than bringing the thing itself into the system, meaning that the thing is free to be updated independent of the system. Here when the user 'views' the file (using the same three options as presented above) the link or shortcut is followed to open or launch the page/file/application for the user.

Note the undo button is shown as lit for this user because the user also has the file checked out.

When viewing Planner (.spn) files these may be set to open in Planner using your options form instead of setting up the file associations in control panel.

Save Local Copy

Overview

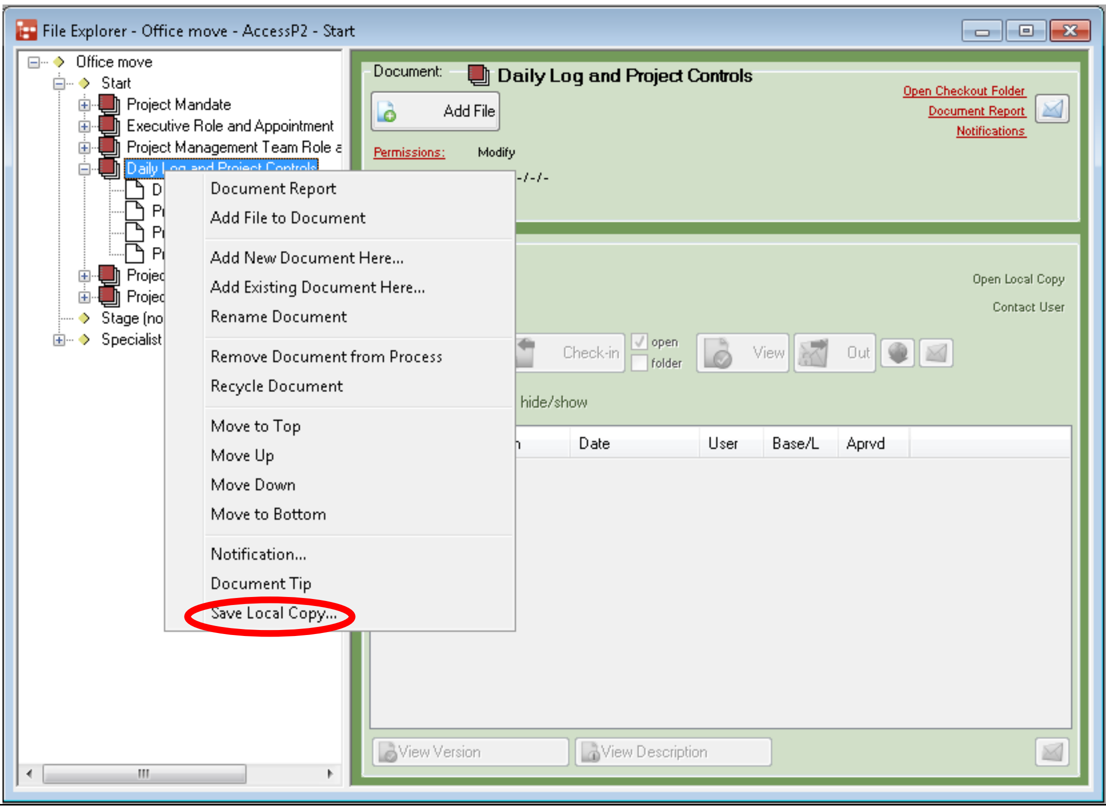
Save local copy brings a 'view' type copy of the current version of every file in the document down from the server and puts them in a location you select. This allows you to review the whole document easily when it contains multiple files.

This is not a checkout action and we don't recommend you make changes to these files.

Steps

1. Select the document you are interested in and there are two modes of access:
   a. Right click on the document and use the 'Save Local Copy' option
   b. Use the Document – Save Local Copy item in the main menu
2. You will then be provided with a browse control to select where you want to put the local copy.
3. The Local copy will follow your settings for zipping.

Screens



Notes

Although you have the files and could edit them if you wished these are **UNCONTROLLED COPIES FOR VIEW PURPOSES ONLY**. Depending on your settings for file naming convention the file name may include the (view) element and it may have been provided with the windows read-only property set.

Where the document contains an internet or Windows shortcut local copies of these will also be provided and will appear like conventional shortcuts and will still go to the required destination if clicked on.

As an alternative to using the form, since version 2.5 it has been possible to drag files off to the desktop. Right click on the file name in the File pane and holding the right click drag out to the desired drop location, wait for the cursor to change to indicate a drop is permitted and release the right click to drop. This is considered a as a view and the file will be auto named appropriately. This only applies to current versions of files.

View historic files

Overview

The system automatically saves all previous versions of files and occasionally a user will want to view one of these and this is achieved from the File Explorer form.

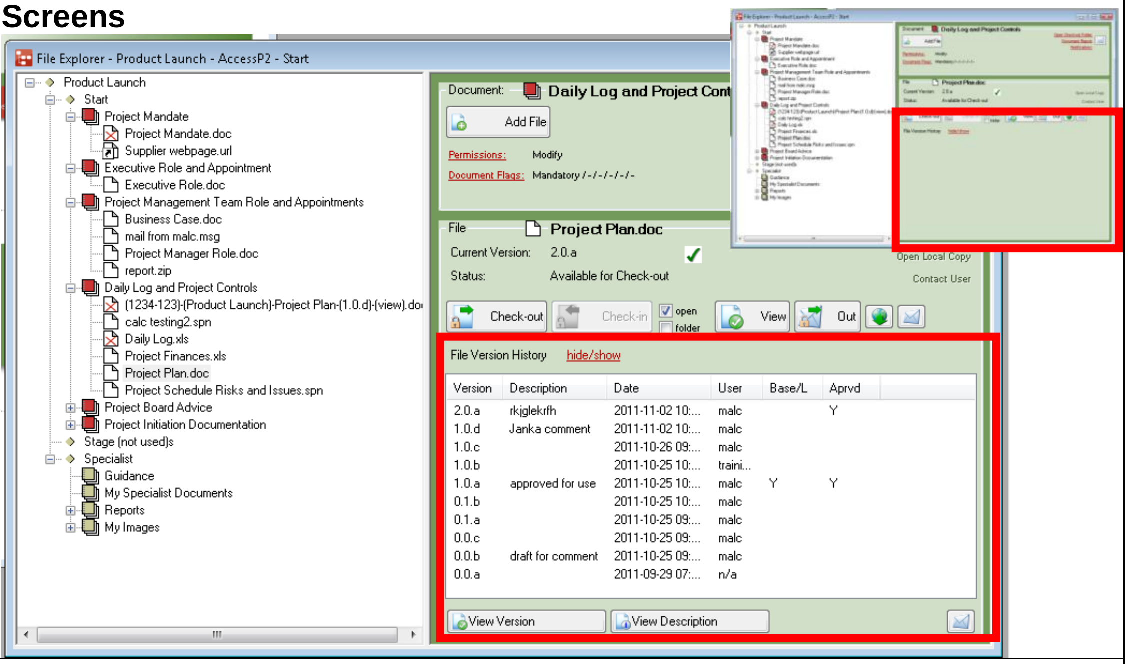
Common reasons are to check progress or review changes in an aspect of the project. Users may view any previous version of the file that they wish. They may also decide to view multiple different versions for side by side comparison (consider the Word compare feature here).

The Version History can be Shown or Hidden depending on a user's preference for the detail on the documents. If hidden it can be shown by clicking on Show and vice versa. The History also displays which versions of the file were flagged as a Baseline or Approved when the version was created.

Steps

1. Select the file you are interested in and with a single click put the file into 'focus' to see the previous versions populated in the history part of the document pane (ringed in green below).
2. Click on your chosen version in the history area to put this version into focus then you can use the view or send buttons to open locally or send this file by Outlook. Alternatively you can just double click on the version in the history list to open it to view locally.
3. The file will open on your PC using the default package for the file type.

Screens



Notes

Although you have opened the file and could edit it if you wished this is an **UNCONTROLLED COPY FOR VIEW PURPOSES ONLY**. The file will have been placed by the system in your default view/temp folder for the purposes of opening it locally. It is not possible to 'check out' previous versions of a file once the file is saved as that version with its description it will remain the same in the audit trail.

If there is a long description associated with the version of the file the comment button below the history area will show you this in full.

As described in View Current files above, if the file is an internet or windows shortcut the history will take you to the URL/object saved with the hyperlink/shortcut for that version. Generally internet/windows shortcuts do not have as much history (as many versions) as the content at the end of the link changes outside the control of the system, although it may be changed periodically if the location moves or a new description is appropriate.

Check file out (local)

Overview

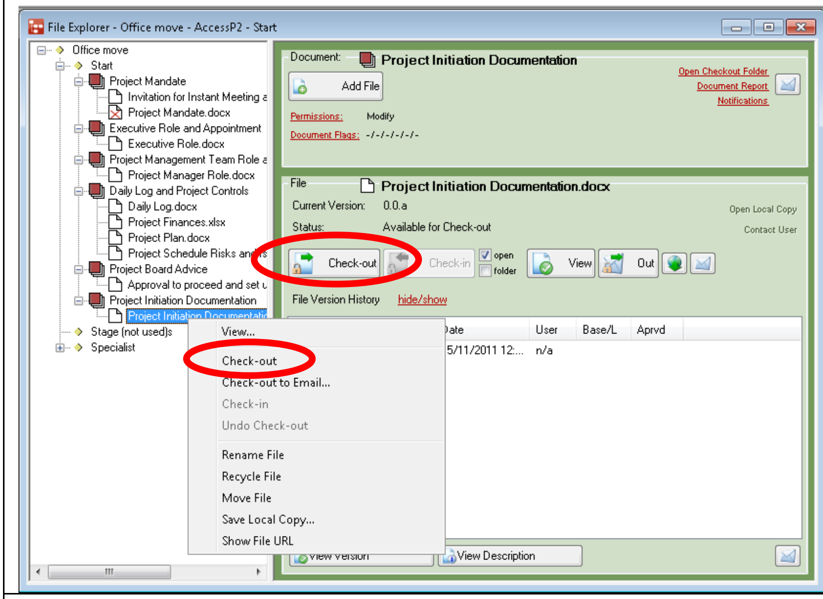
Users must check out a file to make changes to it. Checking out a file to a local folder location gives the user control and responsibility over the file, enabling them to then make changes to it as they wish and then check it back into the system to have these controlled and shared with colleagues. In this way users work with files as they will have done traditionally when working in Windows Explorer, even when there is no access from the client to the server.

Checking out a file is controlled by the permissions level granted to you for the document which contains the file (as shown on the document pane). To check out a file you must have read/write or higher permissions on the document. When checking documents out to work on them you have two basic options, local check out for you to work on yourself or check out to Outlook message where you pass the file to a colleague(s) to undertake some activity (see Check out to message guide below).

Steps

1. Go to the file you require then single click the file icon in the document tree to select it, there are then three ways to check it out:
   a. Right click on the file and use the check out option in the menu
   b. Click the 'Out (paper)' button in the document pane (this will be lit to indicate focus) to check out local
   c. Use the File – Check out items in the main menu
2. The file will open on your PC using the default package for the file type. The file will now be marked as checked out to you in the system
3. If using Word then any Doc properties set for the project will have been updated.

Screens



Notes

Once you have the file checked out you effectively have the master. The system will have placed the checked out files in a different place on your local PC (your checkout folder) when they are sent to you to create a separation from files sent to view. You can set your preferences for where these files are stored using the Options Quick Click. A link is provided on the document explorer to the checkout storage folder for your current project and directly to the file once checked out with the Open local copy link.

The tick boxes next to the Out button control the checkout action, with open ticked it will open locally for you after checking it out, with folder ticked it will provide a browse control so you can choose your checkout location as opposed to the default checkout folder.

When you have the file checked out to you this will show against file status and the 'Open local Copy' link (greyed out above here) will become a red hyperlink to allow you to directly open the local checked out version of the file (only if you are using default checkout folder location).

Check file out (to message)

Overview

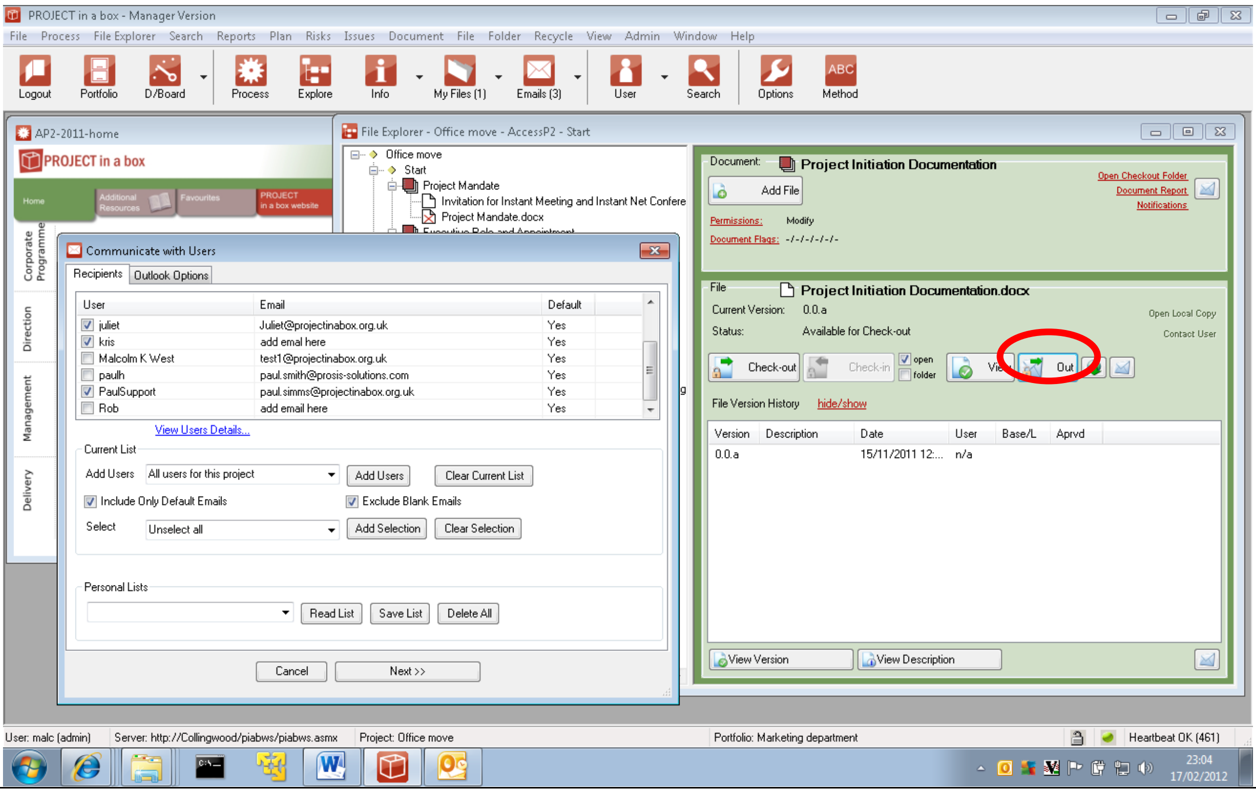
Users must check out a file to make changes to it but if you want a colleague (including a partner or supplier) to make changes to a document but they don't have access to the system (or sufficient permissions to check out the file themselves), you can use this feature to check it out and send it by email. This check-out to message is worked on the permissions of the person checking the file out not the person/people receiving it and the file in time will need to be returned to the person who originally checked it out, to be checked back in.

The checked out file will be attached to an Email message (email, appointment or task if using Outlook) and sent to a list of users from your project as selected by the user in the 'communicating with other users' form which launches after you have started this check out process (see further later under Outlook integration and other Email Integration).

Steps

1. Go to the file you require then single click the file icon in the document tree to select it, there are then three ways to check it out:
    a. Right click on the file and use the check out to email option in the menu
    b. Click the 'Out (envelope)' button in the document pane (this will be lit to indicate focus) to check out directly to the message
    c. Use the File – Check out to email item in the main menu
2. The Communicate with other users form opens, select the users you want to send it to and the type of message you want to use. You can select no users at this point if you want.
3. A normal Outlook message of the required type is created; you can now add your own comments or additional users from your personal Outlook address book before you 'send' the message. The process varies slightly for none Outlook email users and is explained in the 'Other email Integration' Factsheet.
4. If using Word then any Doc properties set for the project will have been updated.

Screens



Notes

While you have the file checked out you effectively have the master even if you have sent it to someone else to action.

When checking out to message the system doesn't put the file in your checkout folder (as you would then effectively have duplicates) so make sure the person you sent the file to returns it for you to check back in. If you are sending it to somebody for information, rather than to make changes you should use the send button at the document level or select the current version in the history table and use that local send button to achieve the same result without having to chase to get the file back to check in at a later date.

Check file in (local)

Overview

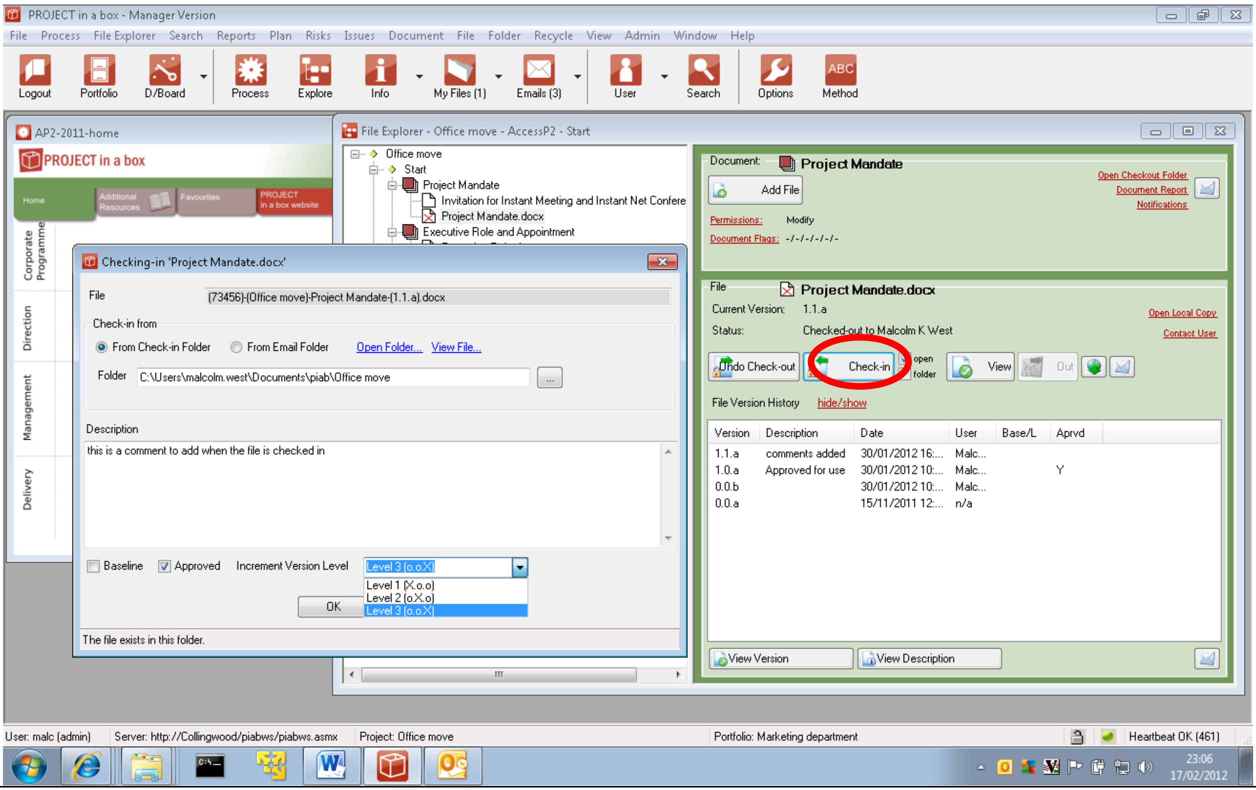
The process of checking a file in completes the activity of updating a file. A file may only be checked back in by the person who checked it out and the name of the file being checked in must be an **EXACT** filename match to that expected to ensure incorrect files are not loaded accidentally.

The act of checking a file back in relegates the previous current version to an historic version and creates a new version number for the file checked in with your optional comment/description of the changes. The approach described here can be used for any files, even those returned by email but more direct routes are provided for those files as explained in the next topic Check file in (from message).

Steps

1. There are four ways to check a local copy file back in:
2. Find the file in the file explorer window then single click on the file to select it and:
    a. Right click on the file and use the check in option in the menu
    b. Single click to put the file into 'focus' then click the 'In (paper)' button in the document pane (this will be lit to indicate focus)
    c. Use the File – Check In option on the main menu
3. Use the My Files for from Quick clicks menu (further details in the following topic).
4. This will open the Check in file form which defaults to look for the expected file (as named in the file dialogue) in the checkout/in folder. If the file is present there the file dialogue is coloured blue/grey as shown below. If there is no file there with that name the area will be red and you will not be permitted to complete the check in. If the file isn't present you can switch to the 'from email folder' using the radio buttons or browse to the expected file location (location rather than file itself as the file name is always known). Once the file is located the colour of the dialogue area will change.
5. When the file is shown as present you can view it, provide a comment/description of the change, choose a version level revision if required and then press OK to complete the check in. If you have modify rights over the document you can also set the Baseline flag against this version of the file or make a self-approval using the tick boxes at the bottom of the form.

Screens



Notes

Safeguards are in place here to ensure you don't accidentally check the wrong file in. If required you can of course rename files you want to check in to match the expected name, this is acceptable as it will be evident from the versions stored for audit trail that you did this.

Checking in from the check in/out folder is a much simpler processes than browsing to find a file, consider this when thinking about file check out locations.

My Files (Check in management)

Overview

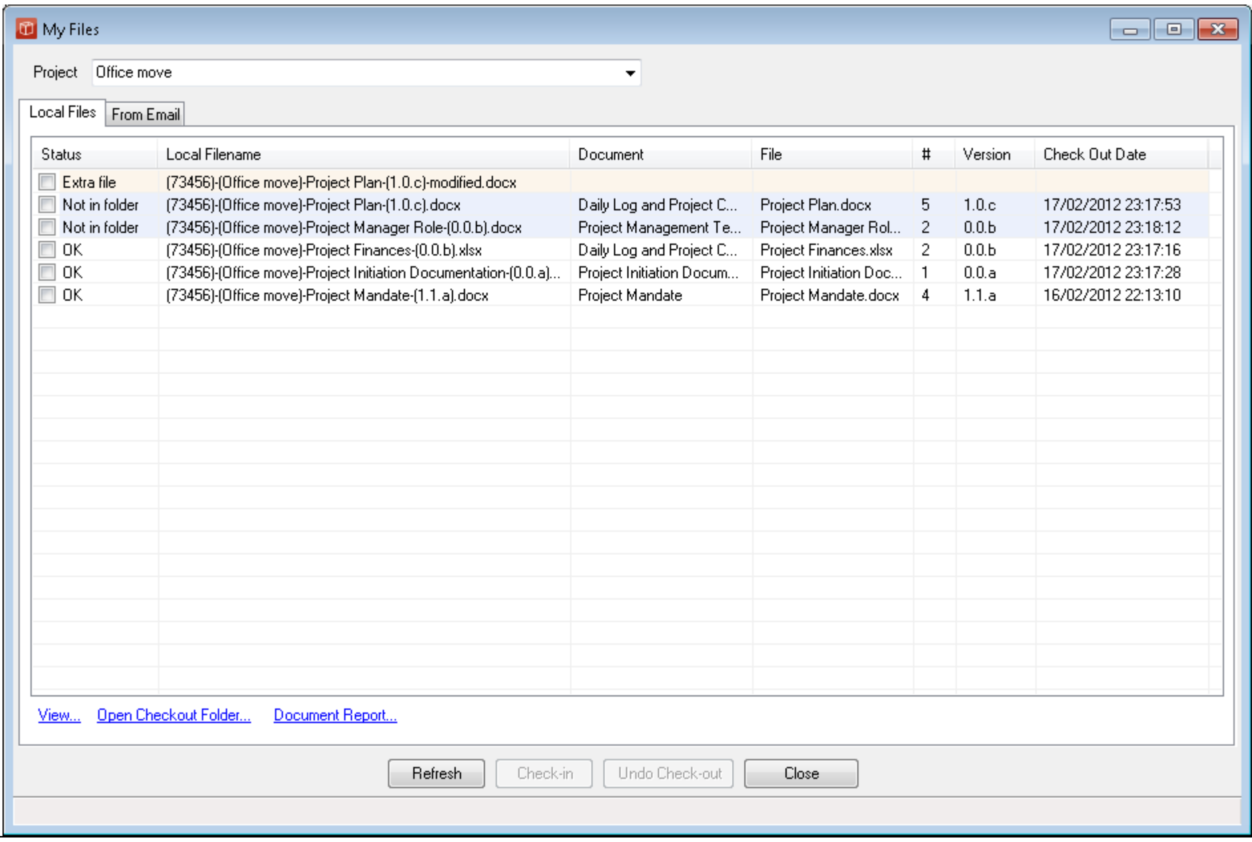
When running through a quick check out and check back in cycle the topic above handles this very well or when you are in the process and decide to check back in a file earlier checked out.

The My files form though gives you broader management of your checked out files allowing you to review all files checked out to you and other contents of your checkout folder from the My Files form on your Quick clicks menu (ribbon). The my files Icon on the ribbon shows the number of files checked out in your current project which are awaiting check in and present in your check out folder.

Steps

1. Local files tab gives a list of the files known by the system to be checked out to you and shows their status as:
    a. Ok –present in folder and available to check in if required
    b. Not in folder – checked out to you but not in checkout folder so likely sent by email or with an edited name
    c. Extra file – content in your checkout folder but not with a name to match any file checked out to you.
2. Links allow you to select a file and view it from checkout folder or get a document report depending on permissions
3. If ticked or double clicked you can then check in or undo checkout, or both depending on the status of the file. These actions follow the usual pattern opening a check in form etc.
4. The checkout file itself can also be opened or the from Email tab can be selected to switch to the Bulk email check in form to check in files returned from email.

Screens



Notes

To switch to a different project use the pick list at the top of the form.

If no access is possible to the server (no network or not logged in) the My files button will instead open the checkout/in folder so you can work directly on the files.

Check file in (from message)

Overview

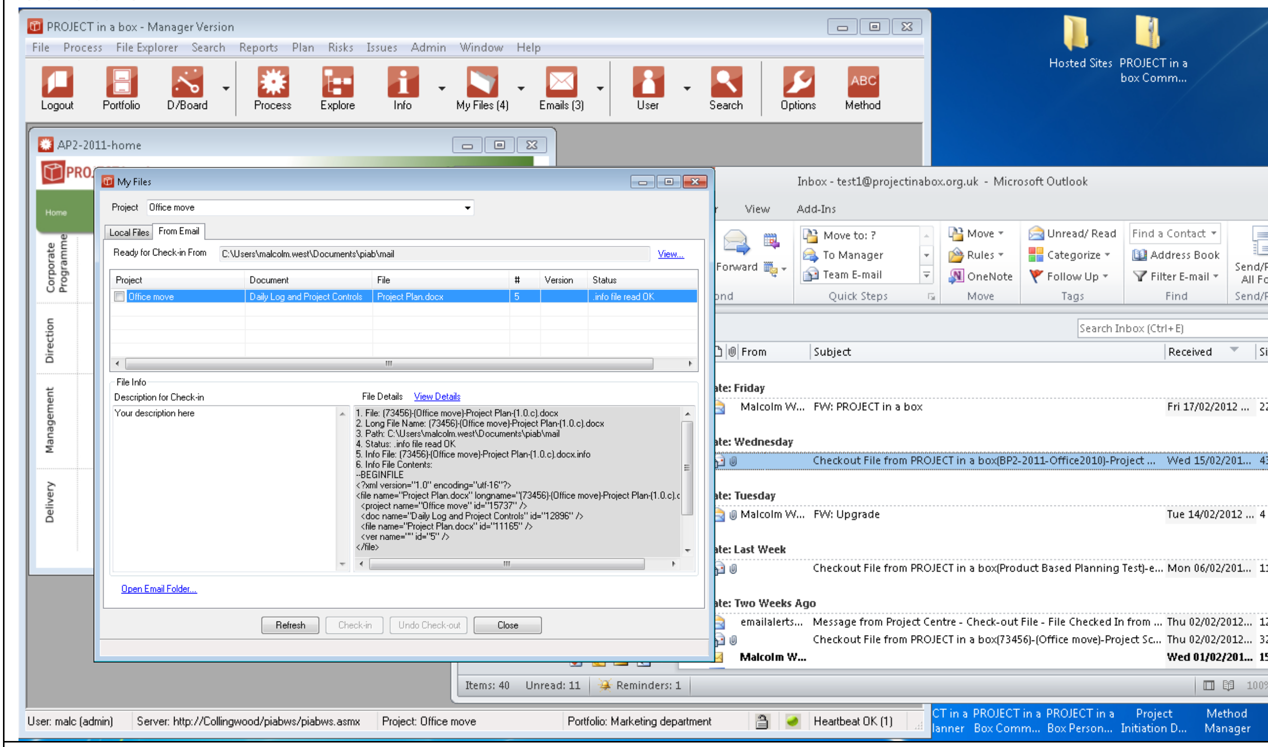
The process of checking a file in completes the activity of updating a file. A file may only be checked back in by the person who checked it out and the name of the file being checked in must be an **EXACT** filename match to that expected to ensure incorrect files are not loaded accidentally.

Two methods are provided for removing files from your outlook messages for Check in, Outlook toolbar move to email folder and drag and drop to the application. Both then use the My files from email form.

Steps

1. Drag and drop grab your returned email in Outlook and drag it to the Emails icon on the Quick clicks menu when you release he count number displayed should increase by one.
2. Outlook toolbar move to email folder (requires your outlook toolbar to be installed):
   a. Click to select a message in outlook with a file attached to check in.
   b. Click on the outlook tool bar and follow instructions to move the file to your email folder
   c. Now when checking the file in as described earlier for (local) swop the folder to email folder and the file should be present. Alternatively use the Main menu File > Check in from email form to review and check in all the files in your email folder (you can also include the comments provided by the email sender) {approach shown below}
3. Once your file is returned via the methods above you can open the My Files from email form with the Quick clicks button and manage the checkin of files held for the current project.
4. Normal checkin rules apply.

Screens



Notes

You can switch between My Files from email and My Local files using the tabs or the pick list at the top allows you to swop projects. As you process files returned by email back into the system the count will be adjusted to reflect your check ins.

Once the file is returned from Outlook the normal ‘local’ check in form can also be used from within the file explorer, note the file will display in email folder instead of check out folder.

Auto Check in a file

Overview

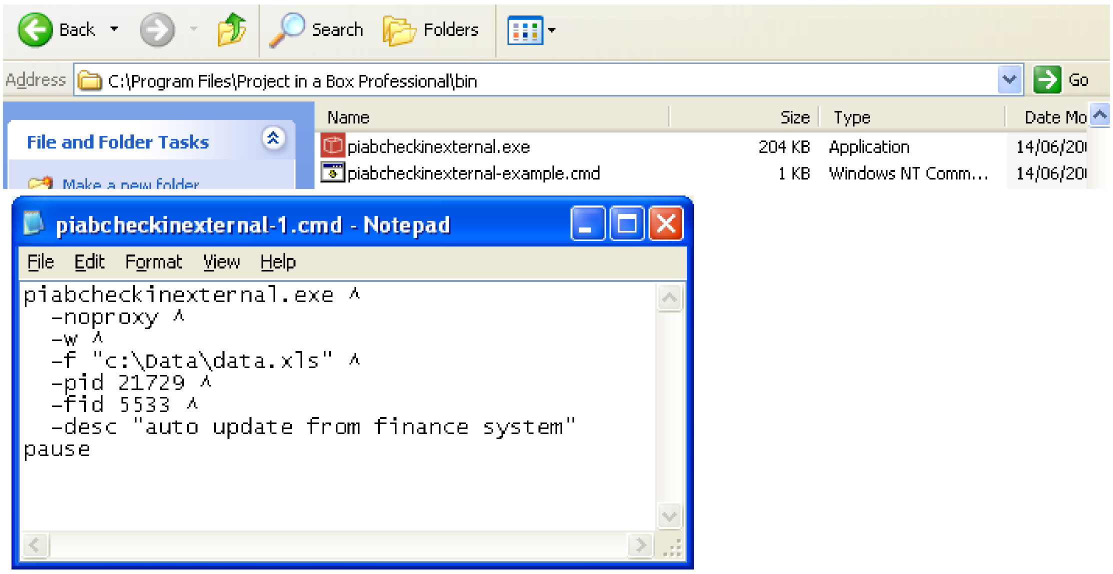
Where a project contains files which are generated routinely by other business systems and need to be updated into PIAB this can be automated instead of asking a team member to look for them and add them. The most common occurrence of this is the weekly or monthly finance data produced by a Finance System and required for project reporting.

PIAB provides an executable which when run follows a set of instructions in a config file to look in a set location for a particular named file and if present to load it into a particular document and project in PIAB. This executable can be actioned by the system creating the data file or can run on a timed service as best befits the nature of the files and systems in question.

Steps

1. Locate piabcheckinexternal.exe executable (in application bin folder):
    a. Identify the file address of the file you want to Auto check in.
    b. Identify the Project and File ID you want to load into.
    c. Provide the text to be used as a description
    d. Include these in the cmd file for the Auto check in (example below)
2. Activating the .cmd file will undertake the Auto check in this can be done:
    a. Manually – by double clicking on it.
    b. Activated from another application – by developers in code.
    c. By a windows service – set a service to check for the presence of a new file in the location, when one is found trigger the ,cmd, then remove the source file and monitor again.

Screens



Notes

Uniquely in PIAB this Auto Check in will check the file in and create a new version of the file irrespective of its status at the time. I.e. the file doesn't have to be already checked out to a particular user. The autocheck in executable also doesn't have an interface and is managed using config files.

Any number of these .cmd files can be set up to bring files into different projects or documents as required. Further information is provided in the PROJECT in a box Knowledge Base.

Request File Approval

Overview

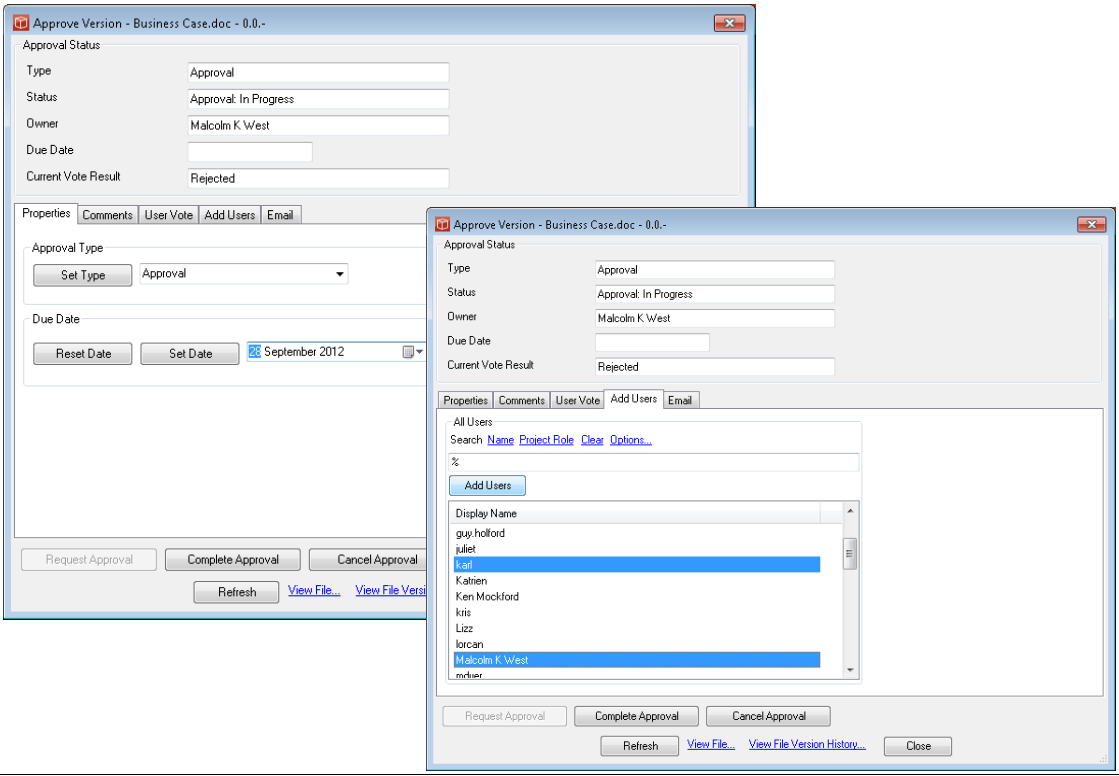
Where just one person needs to approve a file they can check it out and then check back in using self-approval (if they have Modify rights). If the user has a lower permissions level or multiple users are required to give approval then an approval cycle can be set up by a modify user.

The approval cycle allows the approvers to view the file and leave comments before voting on the outcome (approve, abstain, reject etc). The combination of votes gives a decision on the file and this can be locket in place by the approval manager with the comments and other evidence.

Steps

1. Right click on file or use file actions menu, select Manage Approval
    a. Start the process with Request approval, then select or enter a new type and if relevant a due date.
    b. With the Add Users tab select the users to be invited to vote, select from list or search on name or project role. Then Add.
    c. Use the comments and email tab to inform the voters what is required
2. Once started the Approval can be managed from right click or in the My Approvals tab of the My Files form where a list is kept with useful statistics.
3. At any time you can remove or add voters, provide comments or resend emails.
4. Completing the approval will set in stone the comments and votes and the decision automatically derived from the votes that have been given. It cannot then be changed.

Screens



Notes

For a successful approval there must be at least one approved or approved with conditions vote, no rejected votes and some voting response from everyone currently invited (users can abstain but must vote that). If agreement cannot be reached then the Approval owner can complete as a rejection or cancel but in both cases the approval is then locked and the file must be checked out, altered and checked in before another approval cycle can begin.

Give File Approval

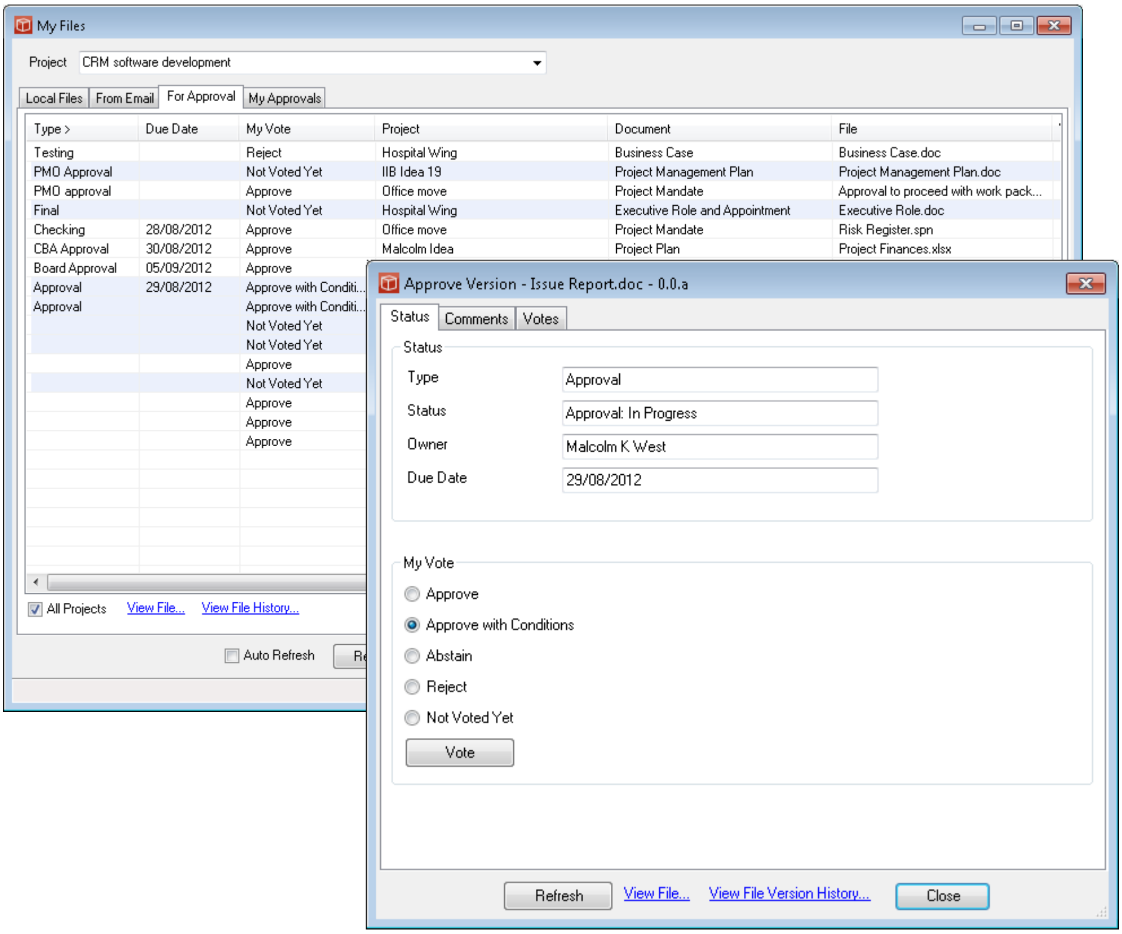
Overview

You may have been invited to approve files held in PIAB, if you have received a notification email about this the link will take you to the For Approval list in the Enterprise hub (see later section). You can also access the for Approval list in My Files and vote on them from the client too.

Steps

1. Open the Approve file form, either from My Files, For approval tab (which provides a list with stats etc) or by selecting the file in the File Explorer and using the approval button in the version history.
2. In the Approval form you can vote, read or leave comments about the other approvers thoughts and see their votes.
3. You must make a vote or the Approval process cannot be successfully completed. Approve or Approve with conditions can result in an Approval, or Abstain can if other users Approve. Reject will mean no successful approval is possible.
4. You can change your vote or add comments at anytime when the approval is open, once the owner has closed it your votes and comments are locked.

Screens



Notes

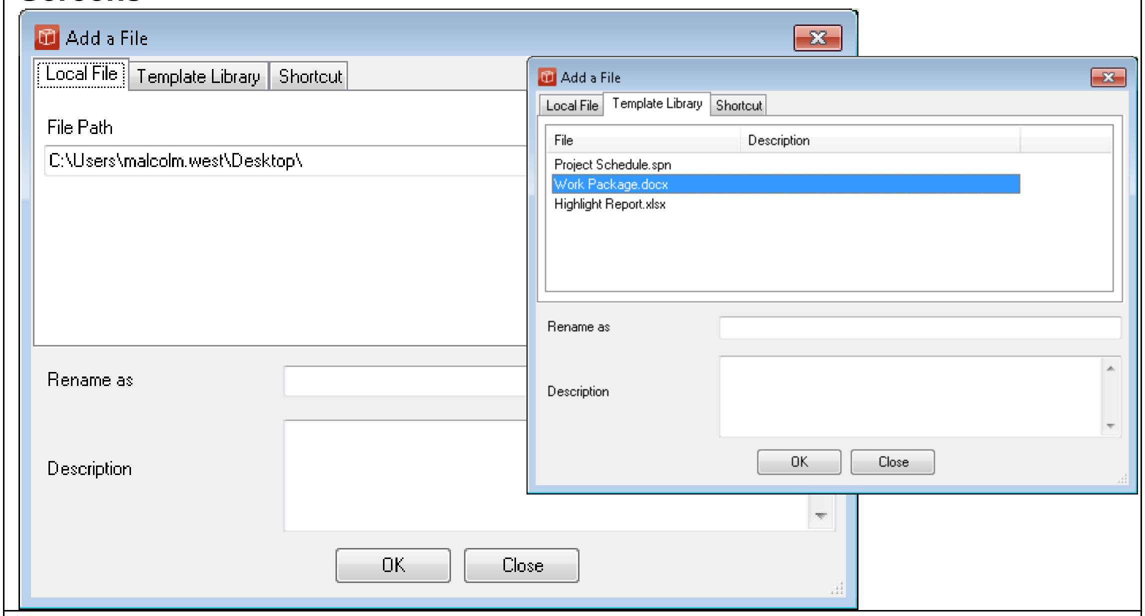
Use the view file link to see the file you are being asked to approve, you cannot make changes to it but you could approve with conditions and use the comments area to state what your conditions are. View file version history will enable you to see details of previous approval cycles for the same file at previous versions.

Add new file

Overview
Although a new project is prepopulated with a set of template files users will want to add new files as the project progresses to record information, actions etc. The system can accept any type of file as it won't attempt to open it. It simply just stores it and makes it available to other users.

You will need Read/Write, modify or Admin permissions for the current document to add a file to it.

Steps
1. Navigate to the document you want to add the file to, either in process mode using the process diagrams or by selecting the File explorer from Quick Clicks, activating the Index mode (Document index view) and browsing alphabetically.
2. Files can then be added using one of the three following methods:
    a. Right click on the document in the Document tree and then use the 'add file to document' option.
    b. Click on the document to put it into focus and then use the Add file button in document pane or the Document.
    c. Add file to Document option from the Main menu.
3. This will open the Add a File form:
    a. Use the local file tab to browse to the file you want to add, provide a description of the file and then press OK to complete the process.
    b. Use the template library to select one of the standard file types, rename if required and provide a description, press OK to complete the process.
4. Alternatively, after step 1 find your file and drag it on to the PIAB file explorer **dropping it on top of the add file button**, this will then open the add a file form to enable you to leave a comment or change the file name before committing the file to the system.

Screens


Notes
Consider when adding a file whether other users will be able to open it, if it is a non standard file type then you might consider providing information about tools to open it in the description/comments section.

If there isn't an appropriate place to add the file then add a new document to house this (modify permissions required).

Add new Internet Shortcut

Overview

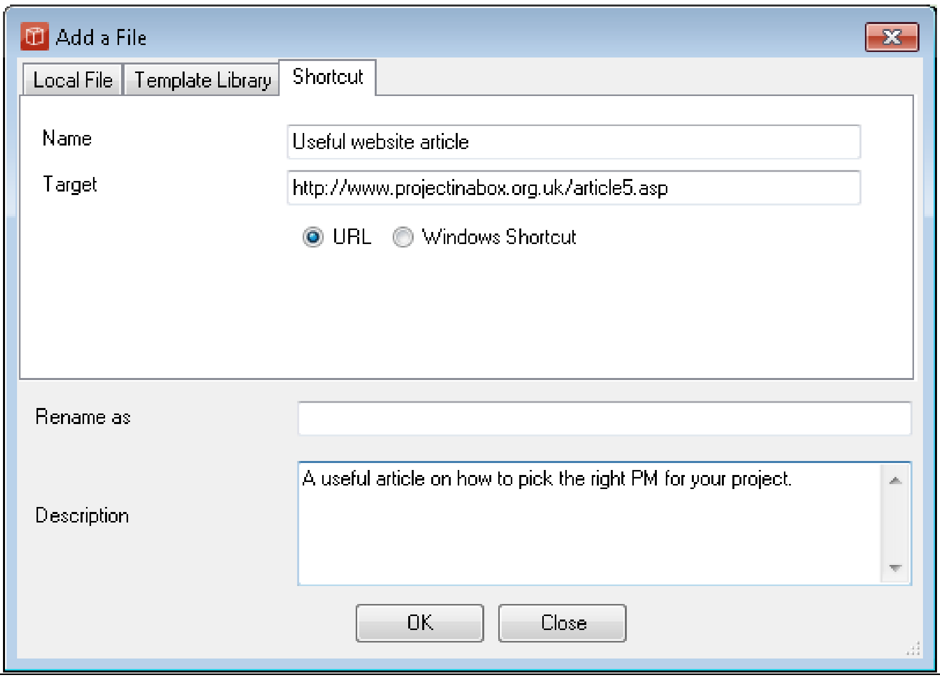
As discussed earlier when viewing files, there may be some information sources such as public websites or corporate policies which you want to refer users to in the context of your project but which you cannot include actually inside the system as files. Usually this is because they will change under a different time frame and are shared more widely than just within the project and if you include a file it runs the risk of being superseded.

By adding an internet shortcut you are storing in the system just the link to the resource and when users click on it the url is run and the source information opened in a browser for viewing. You will need Read/Write. Modify or Admin permissions for the current document to add an internet shortcut to it.

Steps

1. Navigate to the document you want to add the Internet shortcut to and click once to select.
2. Files can then be added using one of the three following methods:
    a. Right click on the document in the Document tree and then use the 'add file to document' option.
    b. Click on the document to put it into focus and then use the Add file button in document pane or the Document.
    c. Add file to Document option from the Main menu.
3. Using the Add a file form select the Create shortcut tab, use the browse feature here to identify which file you want to add or copy paste an existing URL from a browser when you have the source of interest open. Provide a name and description of the file and then press OK to complete the process.

Screens



Notes

This is a very powerful feature the target URLs could be Google search phrases or even links to web applications such as timesheet recording.

Even if you link directly to a file using this mechanism the PIAB naming/numbering and doc properties will not be applied as the actual file is outside of the control of PIAB.

When setting up a Windows shortcut be sure to use the full UNC path name for the source location, do not use mapped drive type links.

Add new Windows shortcut

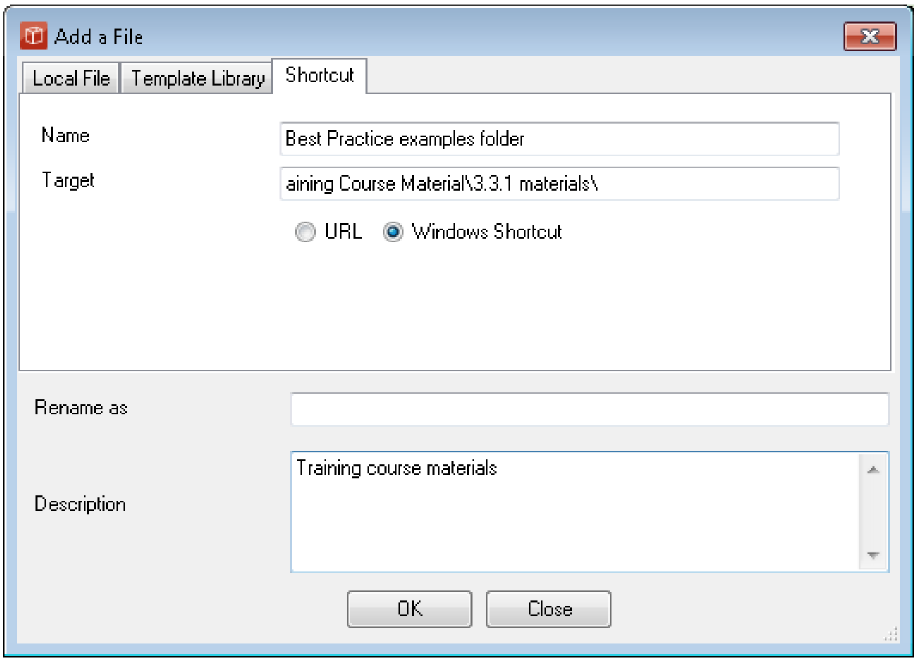
Overview

Almost exactly the same as with Internet shortcuts above this lets you link to a windows shortcut thereby opening a file or application on the users local PC.

Steps

1. Navigate to the document you want to add the Windows shortcut to and click once to select.
2. Files can then be added using one of the three following methods:
   a. Right click on the document in the Document tree and then use the 'add file to document' option.
   b. Click on the document to put it into focus and then use the Add file button in document pane or the Document.
   c. Add file to Document option from the Main menu.
3. Using the Add a file form select the Create shortcut form, use the browse feature here to identify which file you want to add or copy paste an existing URL from a browser when you have the source of interest open. Provide a name and description of the file and then press OK to complete the process.

Screens



Notes

This feature is very useful for organisations with standard desktop builds where if an application is present it will always be in a known place.

If creating a Short Cut to a file, ensure that other users will be able to gain access to the file, i.e. that it is on a shared location, e.g. not on your own PC. Make sure that the address used is the full UNC path name and doesn't contain any mapped drives.

Even if you link directly to a word file using this mechanism the PIAB naming/numbering and doc properties will not be applied as the actual file is outside of the control of PIAB.

Undo check out

Overview

Sometimes you might check a file out intending to make some changes but then decide none are required. The Undo feature enables you to undo your checkout rather than have to check the file back in again without any changes. This enables you to effectively freeze and unfreeze a file for a period enabling other users to view it but nobody to work on it.

You can only undo files you checked out yourself unless you are an Admin user which enables you to undo other user's checkouts.

Steps

1. Navigate to the file you are interested in either in process mode using the process diagrams or by selecting the File explorer from Quick Clicks, activating the Index mode (Document index view) and browsing alphabetically.
2. Roll down the appropriate document (management or specialist product).
3. Once you can see the file icon there are three ways to undo a check out:
    a. Right click on the file and use the undo check out option in the menu
    b. Single click to put the file into 'focus' then click the 'undo (paper)' button in the document pane (this will be lit to indicate focus)
    c. Use the File – Undo check out option on the main menu
    d. A warning dialogue is provided to ensure this isn't accidental, confirm this.
4. The file will immediately reset to being available.
5. Alternately you can also undo a checkout from the My files forms.

Screens

n/a

Notes

If users have the 'Delete local copy of file on check in' option set this will also apply to them undoing their own checkouts and will delete their current copy from checkout folder if present. If the user had checked out to a different folder or to email then the system can't find the file to delete it as the local copy.

Contact a user

Overview

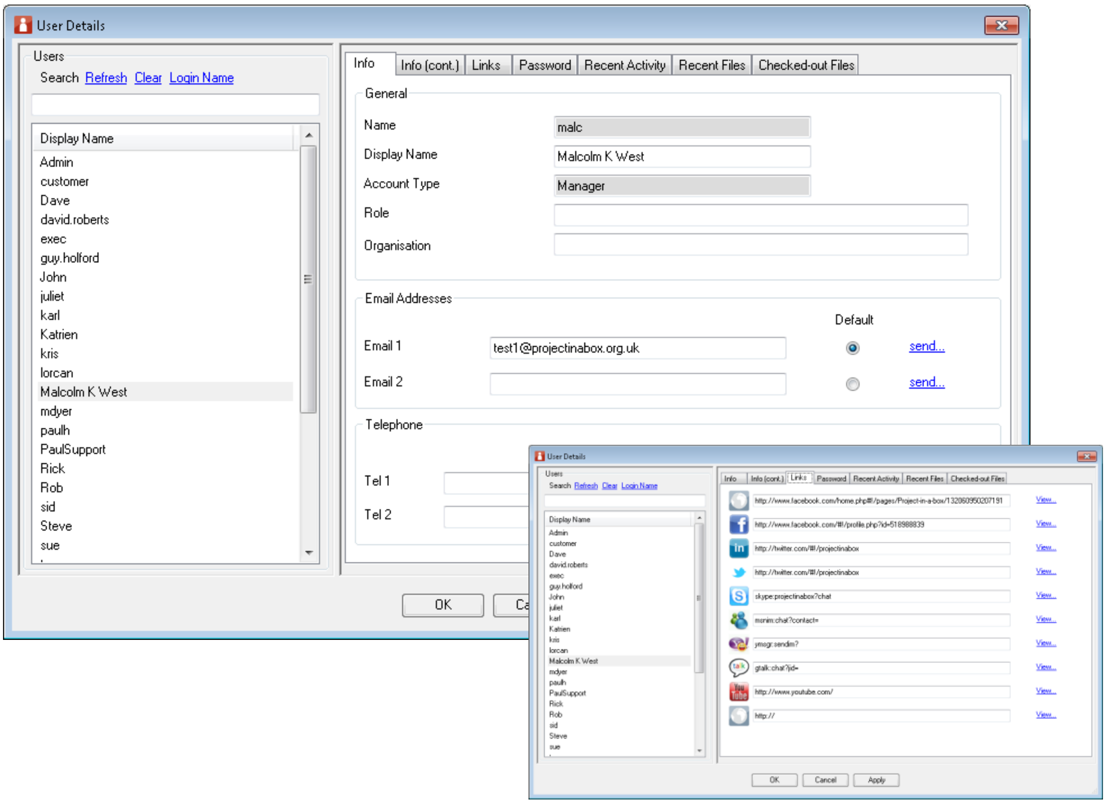
The system provides several methods for contacting both groups of users and specific users in the system. Typical examples are:

- Contact all the team members with an email, task or appointment (see Outlook Integration or Other Email Integration)
- Contact a specific team member with a message
- Contact the user who has checked out the file you want to modify

Steps

1. The team user/my details form can be accessed in the following ways:
    a. When a file is checked out the details symbol lights up and can be clicked to give the User Details form for the user with the file checked out
    b. Click the My details Quick Click icon to show the form for yourself
    c. Main menu Admin – My details to show the User Details form for yourself
2. Once the form is open you can select any user of the system using the pick list or search facility on the left of the form
3. Using the pick list next to the email address you can choose to send a message to the user via Email (if you are an Outlook user a form will open to give you the choice of Email, Appointment or Task).
4. Press the relevant send... link
5. The Links tab also provides access to the users networking links so you can connect with them using the communication modes they prefer.

Screens



Notes

If you want to contact more than one user at a time, say to arrange a meeting or to circulate information use the Email Integration quick clicks button to use the messaging options against a group of users.

The info (cont) tab will also show you which roles the user has been allocated for the current project.

Modify the project structure

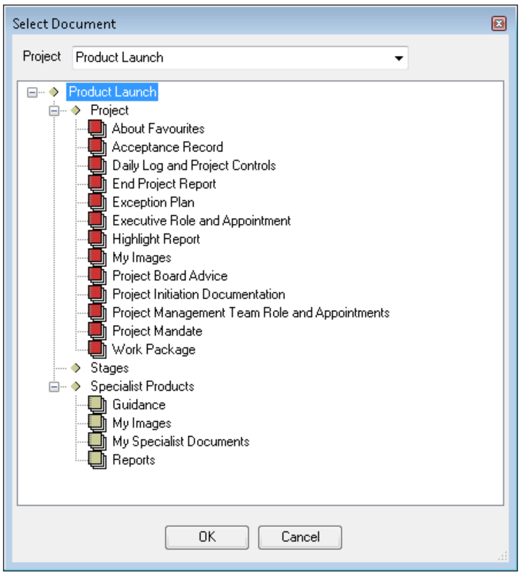
Overview

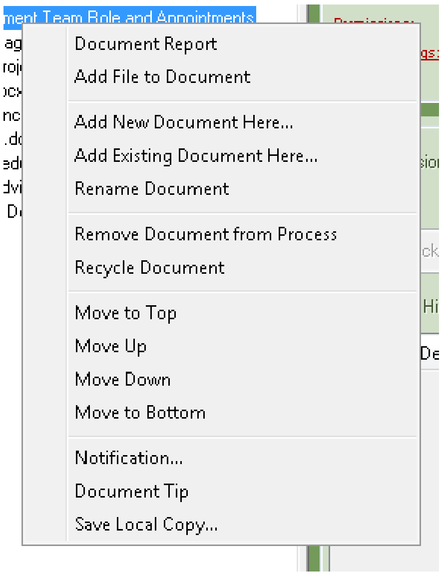
Although created from a standard method template the project may need to be customised (tailored or scaled) to specific requirements when it starts or altered by adding or removing elements as it progresses. Users with project level Modify permissions can progress beyond simply adding or removing files from within the current structure to actually modify the structure itself in many ways as are described below.

Steps

1. The modify structure menu (shown below right) can be obtained in two ways:
    a. Right click from an appropriate document in the file explorer tree
    b. Following a left click on a document in the tree via the Main menu > Document menu
2. The following functions can then be applied:
    a. Rename a document – name opens to edit, type a new name then press enter to confirm the change
    b. Add new Document here – creates a completely new Document entity in the location selected, default name is ‘New Document’, use rename feature to give correct name
    c. Add existing document here – opens the select document form (shown left below), leave the Project as is, select a document and press OK. This will now display the existing contents of that document also in the new location specified
    d. Remove Document from process – stops displaying the document and contents in the current process but leaves it in all others, doesn’t delete any content. Warns you if this is the last use of the document in the system.
    e. Delete document – following confirmation button this removes the document, all constituent files and versions from the project and from other projects it appears in. This is not recoverable.
    f. Add folder - (Specialist products only) inserts a folder, can be multi nested
    g. Delete folder – (Specialist products only), deletes folder and all content located below

Screens





Notes

If you don’t have sufficient permissions ask your project manager or administrator to make changes on your behalf. An extension of the ‘Add existing document here’ can be used to share documents between projects. See the ‘Sharing Documents between projects’ topic for further information.

The topic below ‘Reordering documents in a process’ addresses the Move items on this menu. If your method includes conditional rules for navigation it may be that some processes may not be accessible to you in normal operation. In that case you can use the View all process images, menu item in Admin menu to select the navigation elements you require (modify users only).

Process Properties

Overview

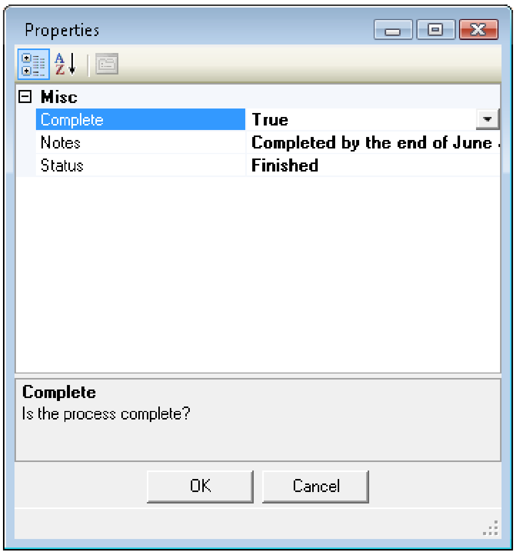
Some users like to record information about the process itself and this form provides that storage location. The fields provided in the form are controlled by the Method Template for the particular project type so they may differ from those shown here.

This form is available to a user with Modify Permissions on the project.

Steps

1. The Process Properties form can be obtained by clicking on the process name at the top of the File Explorer Tree
2. The form is of the same format as the Properties forms provided for Project and Stage elements via the Project Summary Information form. To add or edit data simple click on the item of interest and use the entry option provided, this may be a text field, calendar, pick list etc.
3. When entries have been updates press OK to save the data back into the system.

Screens



Notes

If you don't have sufficient permissions ask your project manager or administrator to make changes on your behalf.

If you believe additional fields would be helpful here request these via your administrator and they can be added to the method template and then shown if appropriate.

Reorder Documents in a process

Overview

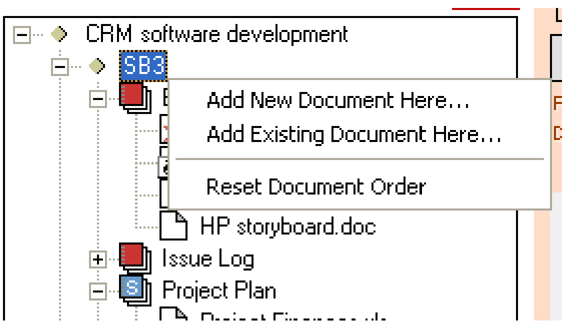
The default setting for PIAB is to show the documents for each process in alphabetic order (unless a different order is provided by the Method Template). Sometimes though the project manager might want to change the order in which the documents are listed in each process to add or remove emphasis from them or to reorder to take account of new documents added.

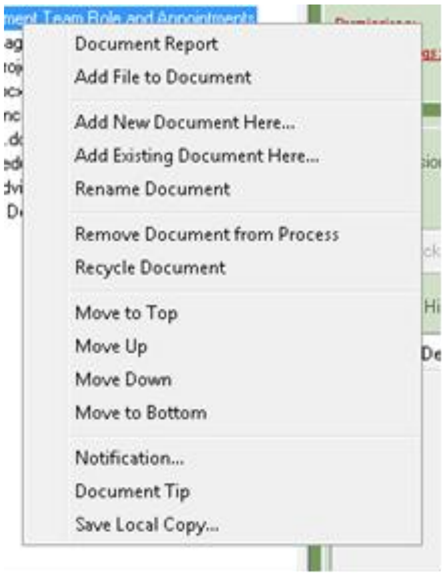
The user must have a Modify permission on the project to be able to access this functionality.

Steps

1. The modify structure menu (shown below) can be obtained in one of two ways:
    a. Right click from an appropriate document in the file explorer tree
    b. Following a left click on a document in the tree via the Main menu > Document menu
2. The user can then select one of the move commands to adjust the structure. By a combination of moves on the documents in each process the new order can be established.
3. There is no save command the order of the process is changed and applied to all users until further changes are made.

Screens





Notes

Changes made within a particular process do not affect other projects, the Method Template or other processes within the project.

If you want to reset the order to alphabetic you can do this on a process by process basis with the ‘reset document order’ option provided with a right click on the process ID at the top of the tree.

These controls will not be available when the File explorer tree is in index view.

If your method includes conditional rules for navigation it may be that some processes may not be accessible to you in normal operation. In that case you can use the View all process images, menu item in Admin menu to select the navigation elements you require (modify users only).

Sharing Documents between projects

Overview

In most cases each project is treated like a silo so although every project from the Complete PRINCE2 template will have a Project Mandate.doc they will not all be the same file on the database but are created one per project by the method template when the project is launched.

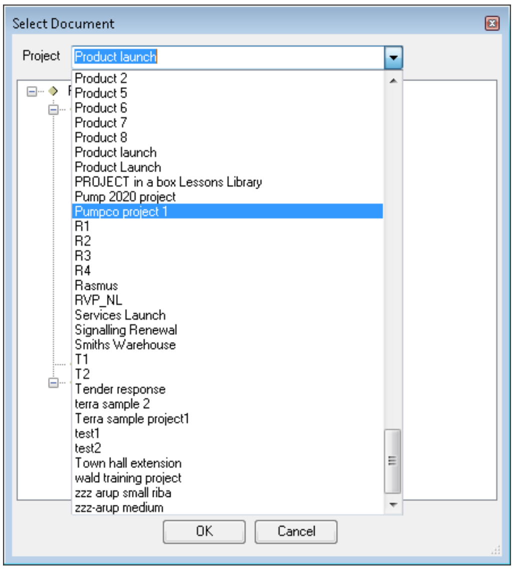
Occasionally though, users may want to share particular files between a number of projects. Examples might include team resourcing spreadsheets or a programme plan which includes elements of a number of projects. This can be done by having a document containing the file(s) in one project and then sharing (using the add existing document feature) the document with one or more other projects. This is effectively then the same file on the server and changes made to it and version control undertaken in one project will be reflected in the others.

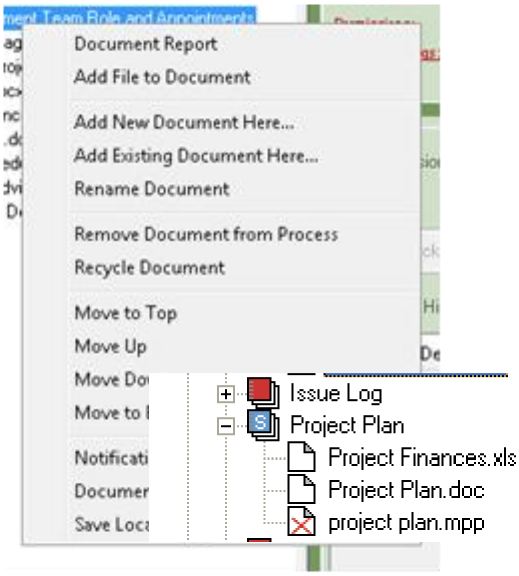
To share a document between two projects you must have Modify permissions on both projects.

Steps

1. Go through the same process as Identified for 'Add existing document here' at 2c in Modify the project structure topic above, except:
    a. When the select project form is open, use the Project pick list at the top of the form to select the project you want to pull the document from.
    b. The document list for that project will then be shown to you (you will only see documents you can share, i.e. that you have modify permissions for)
    c. Click to select the document and press OK.
2. Now the document is shared, we recommend some housekeeping measures:
    a. Run a document report for this Document which should now show the multiple locations it is shown and any custom permissions that apply in any of its host projects
    b. If Custom permissions have been set on one of the projects consider replicating those on the new host project otherwise you may have opened up a broader access to the document than was anticipated by the user in the original project (see the Document Specific Permissions topic).

Screens





Notes

Shared documents are shown with the blue S icon in the document tree (as shown above) information about the locations of the document (which other projects it is shared with) can be obtained from the document report. When working with Shared documents please use the Advanced tab of the 'Document Specific Permissions' form to satisfy yourself that permissions are appropriate in all the locations (they can be different in each project).

URL Shortcuts to file held in PIAB

Overview

PIAB provides controlled access to your project files but usually you have to come to a PIAB interface (software or browser client) to view them. The direct URL shortcuts enable you to provide a link direct to the current version of any file. These links can be used in many ways to help with project work and communications:

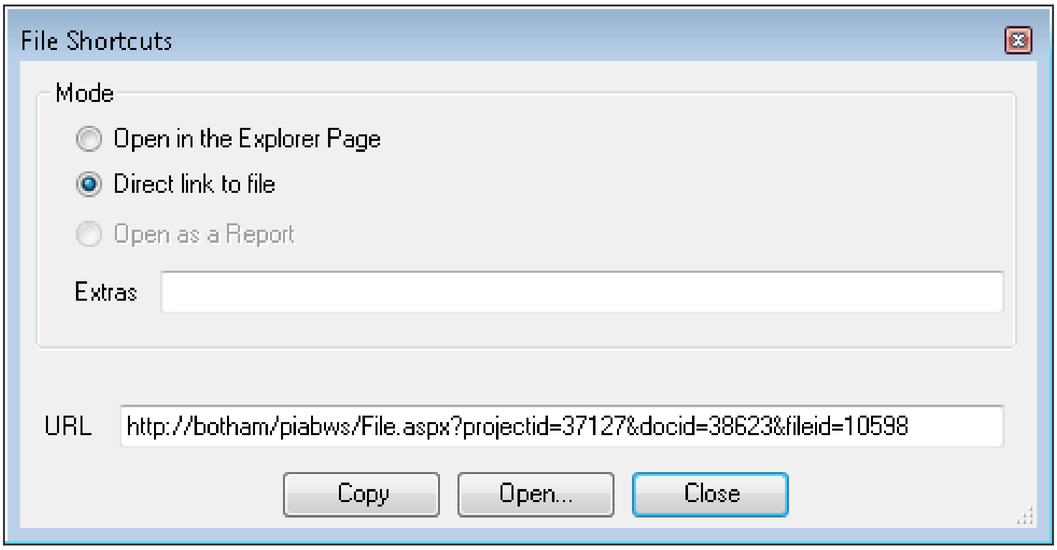
- Included automatically in notification emails so users can view a latest file immediately
- Can be used to compile multi source documents like the PID by storing links to the latest copies of Business case, plan risk log etc
- Can be included in emails or on websites in general usage to share immediate access.

Users following the links will have their permissions checked before the file is displayed, so this doesn't circumvent the normal user file access controls.

Steps

1. Select the document and file of interest in the explorer (this will not work in index view) by clicking on it so it is populated in the file pane.
2. Click the URL button in the file menu (between view and email this file) and the File shortcuts form shown below will open. Showing the three types of links available:
    a. Open in explorer – coded into the link is the current sub process you are navigating from, users following the link will not have the file opened directly but be taken to the process with the file in context.
    b. Direct link to file – click the link will open the file without any process context
    c. Open as a Report – only available from a report document – the link will open as process context but instead in the browser interface report library for easy viewing of PIAB reports.
3. Use open to test the link or copy to add to your clip board you can then go to your desired destination and paste the URL for use.

Screens



Notes

If you are operating Active directory integration/single sign on, users clicking the link will be easily identifiable and the system will know whether to provide the desired access or to give a 'not permitted' message. If not then users will be first shown a browser client log on page where they can verify who they are before the file/process/report library is shown.

Document hints and tips

Overview

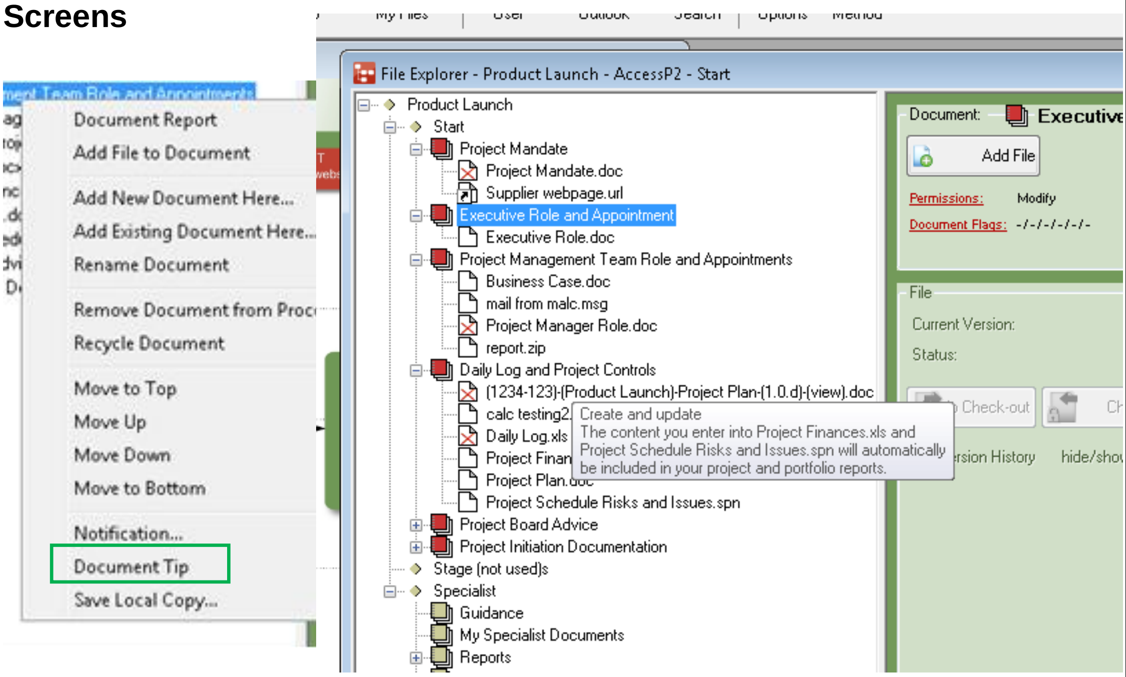
You can now specify as part of your method template guidance hints/tips you want to be shown to users when they hover on a document. The text can be different for each process the document appears in so you can provide context sensitive guidance.

The text is loaded from the method template at the start of the project and a modify user can then edit, delete or extend it as part of the project tailoring process or include new guidance for additional documents they add.

Steps

1. To View – simply hover on your document of choice, if it has notes/tips populated it will display as hover, if there is no display no text is available.
2. To Edit – select the document of interest and right click on it (only available if you have modify permission on the document):
   a. Use the Document tip option to open the document tip edit form.
   b. Edit the tip to your satisfaction in the text area, if a multi line tip is required please use the …(browse) button to pop out a text window.
   c. Once the tip is as required use OK to save changes.

Screens



Notes

No word wrapping will be applied so to save your tips being long and unwieldy you should be sure to use frequent returns within the edit box.

Moving a file

Overview

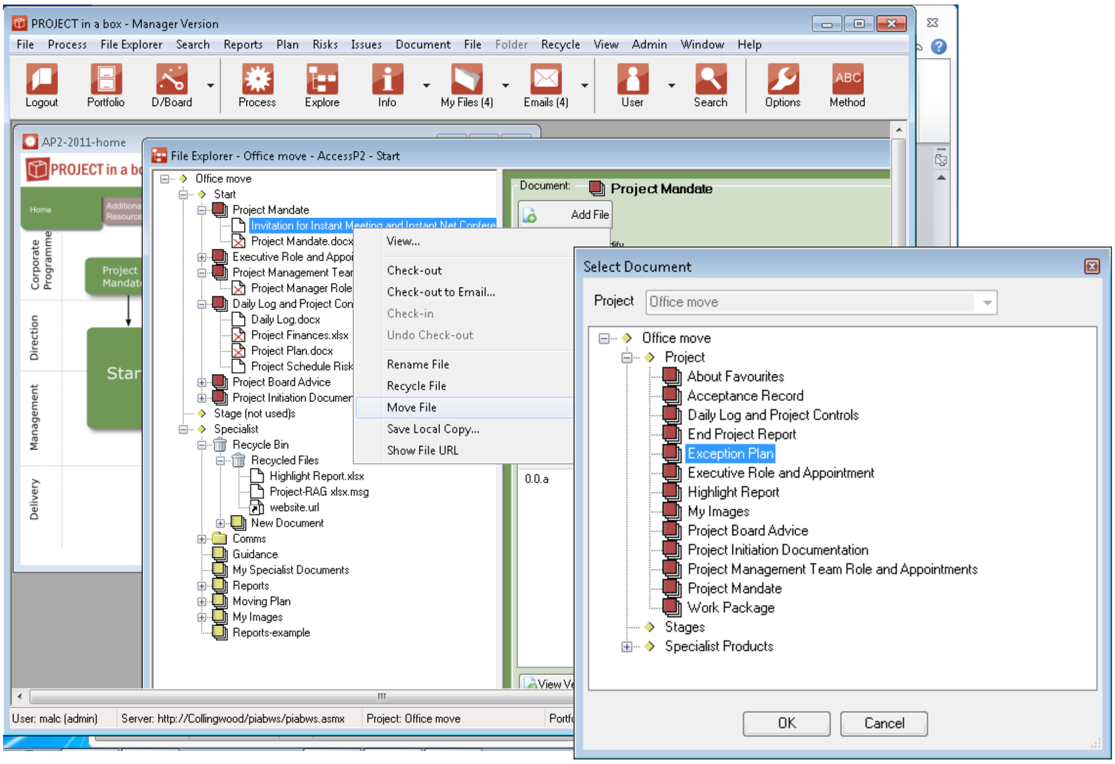
As the documentation on a project evolves sometimes users want to move a file from one document to another. This is treated as a cut and paste rather than a copy and paste activity and the move feature transfers the full audit trail for the file with all versions, view and edit details.

Files can only be moved by Modify level users.

Steps

1. Navigate to the file you want to move, right click on it and select move file.
2. The select document form opens allowing you to select the destination document where you want the file to be placed.

Screens



Notes

Files can only be moved within the current project.

Recycle a file

Overview

When a file is no longer required by the project it can be placed into the project's recycle bin from where it can be later completely deleted or restored to the project if recycled prematurely or in error.

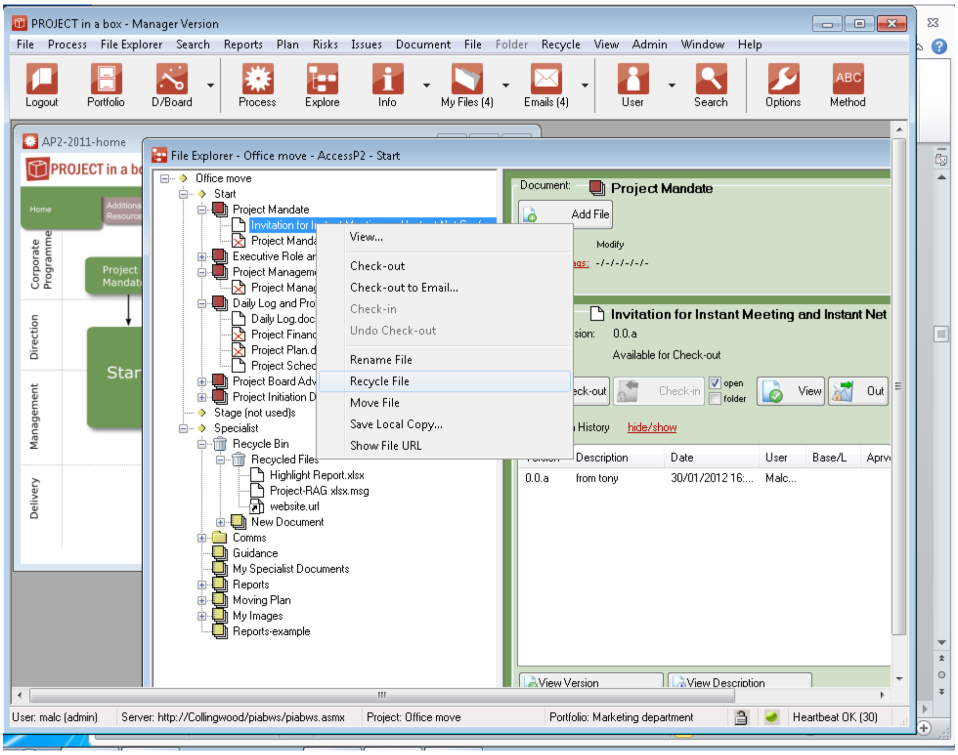
When a file is in the recycle bin it is only available to Modify users and ignored by reporting, search etc. as though no longer present in the project.

Although users with a Read/Write permission can add files, only a user with Modify permission for the document containing the file in question, can recycle it.

Steps

1. Navigate to the file you want to recycle.
    a. Right click on the file and select Recycle file
2. You will be presented with a confirmation box to confirm recycle or to cancel.
3. The file will then be automatically moved into the recycle bin in Specialist. If this is he first file deleted the recycle bin will be created for it.

Screens



Notes

This recycle feature doesn't just remove the current version of the file but the whole file, history and all versions.

If you just want to remove the document and it's from this process you can do this by instructing the database not to show the content in this process anymore (see: Modify the process structure) without having to actually 'recycle' the content, this should always be considered first.

To recover a file from recycle bin right click on it and use move file to select the document you want to put the file back into.

Delete a file

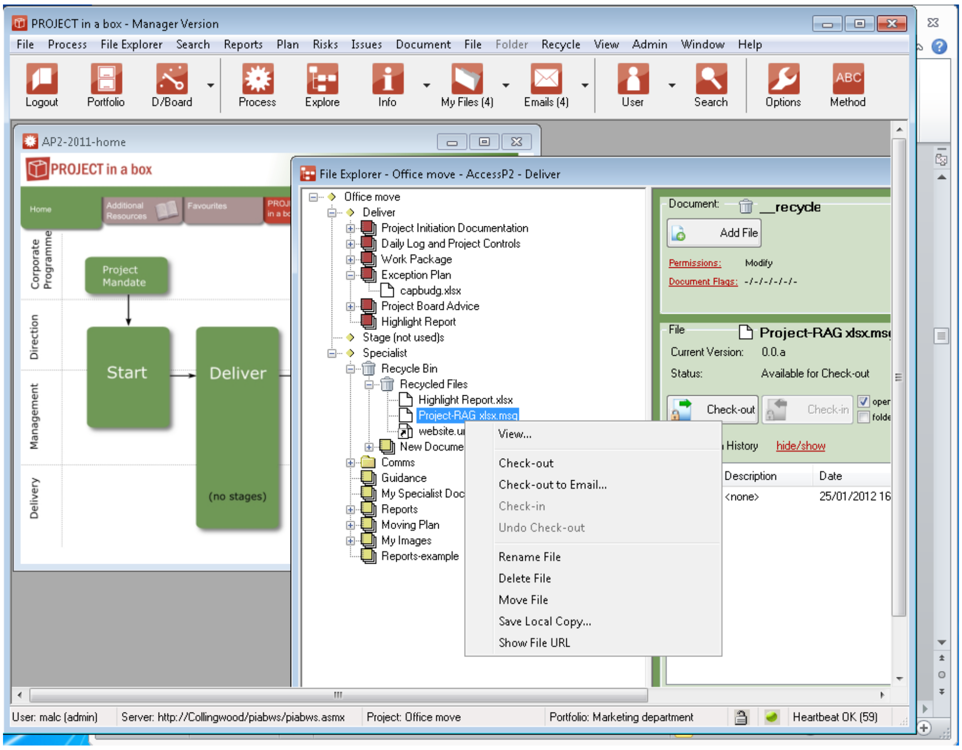
Overview

Once a file is in the Recycle bin it can then be deleted permanently by a Modify user on the project. This will remove it completely from the system and cannot be undone at a later date.

Steps

1. Select the file in Recycle bin you want to delete and right click on it, select Delete file.
2. The confirmation box asks you to confirm you are happy to proceed with deletion, Yes to complete the action

Screens



Notes

This delete feature doesn't just remove the current version of the file but the whole file, history and all versions.

Should this be done in error advise System admin immediately, the files themselves can be recovered by system admin to enable the user to re add them if required.

Outlook Integration

Overview

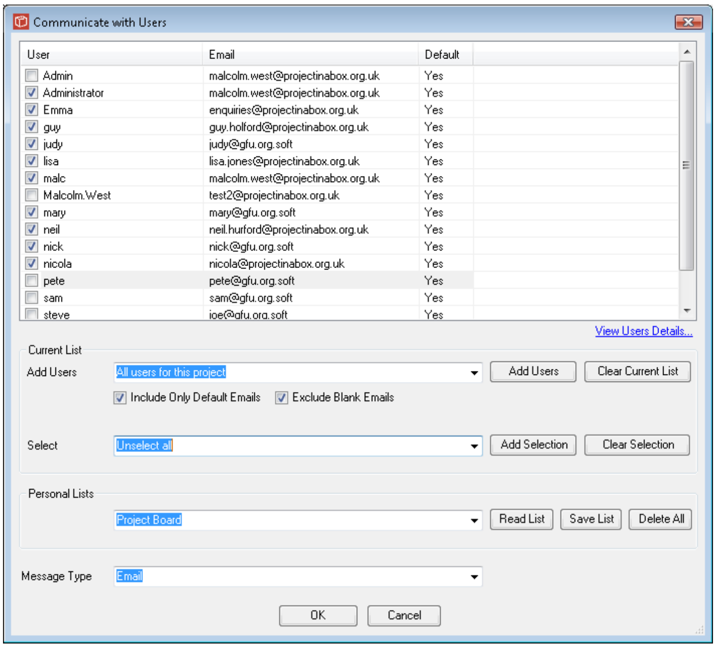
PIAB provides basic integration with MS Outlook (2003 and beyond) including the ability to send Email, Tasks and Appointments directly from the system and to help check-in files retuned via Outlook (currently not in Outlook 2010). This functionality has been provided to make it easier to send email messages to team members and to distribute project documentation to people who don't have access to the system or who cannot check our files themselves.

Outlook activation buttons are provided at a number of locations in the system and can be recognised by the use of the envelope icon, also the Outlook icon itself appears on the Quick clicks menu. Similar features are supported for other Email client users also, see Other Email Integration.

Steps

1. When one of these buttons is clicked it will bring up the email users form allowing you to select who the email should be sent to. This is the case for the buttons to 'send' an historic file copy, 'check out to email' or the email quick click.
    a. The exception to this is the email buttons on the user details form which immediately open an Outlook message (of the type selected) for just that specific user.
2. Use the form to create a custom send list, first select which users to show in your list (either by project role or one of the 'all user' lists in the pick list); then select which of these should be sent to using the select options or by point and click.
3. Once a list is created this can be named and saved in the Personal lists section or a previously saved list can be brought back by picking it from the list and using the read list button.
4. Select the desired message type and then use the OK button to form the information and any selected files into an outlook message which will load on screen.
5. If you want to add additional recipients or further message text you can now do this in the Outlook message window before sending the message.

Screens



Notes

This one step distribution of documents can be inhibited by the system administrator so if your 'Out (envelope)' or 'Send (envelope)' buttons don't light when you expect them to, the feature is inhibited. Creation of Appointments and Tasks follows the same pattern and can be used for checkout or send (copy) of files and documents if required.

Saved email lists are purely personal and will only be visible to you as a library you take from project to project so if naming a project board list remember to include the project name so you can differentiate from the project board on other projects.

Other Email Integration

Overview

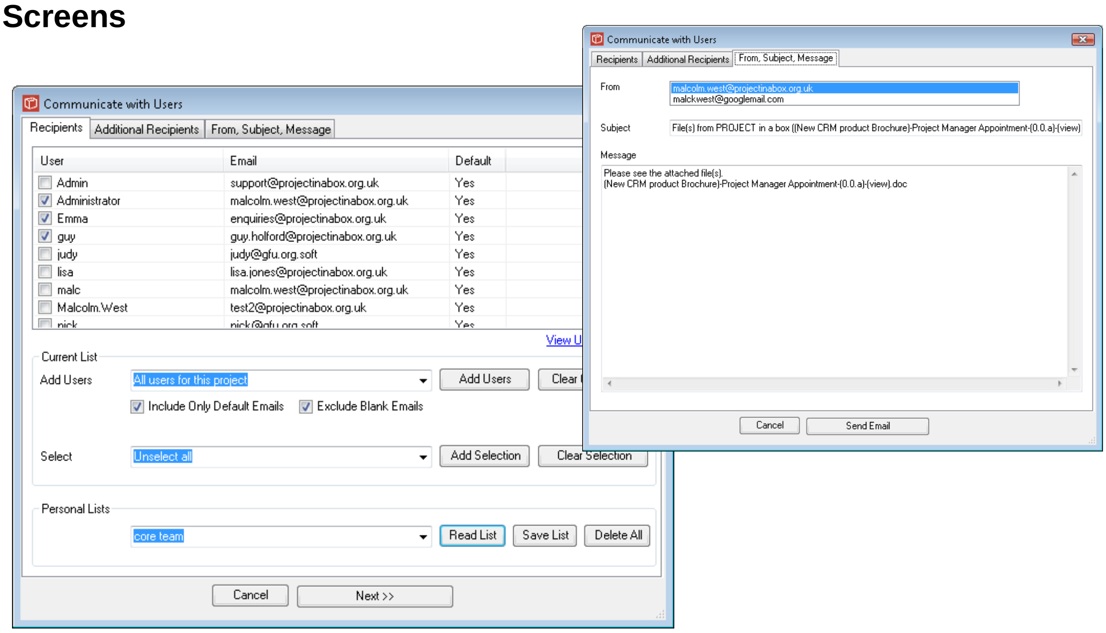
PIAB provides basic integration with non Outlook email users. This functionality has been provided to make it easier to send email messages to team members and to distribute project documentation to people who don't have access to the system or who cannot check our files themselves.

Email activation buttons are provided at a number of locations in the system and can be recognised by the use of the envelope icon including on the Quick clicks menu. A more comprehensive set of features are provided for Outlook users, see Outlook Integration.

Steps

1. When one of these buttons is clicked it will bring up the email users form allowing you to select who the email should be sent to. This is the case for the buttons to 'send' an historic file copy, 'check out to email' or the email quick click.
2. Use the form to create a custom send list, first select which users to show in your list (either by project role or one of the 'all user' lists in the pick list); then select which of these should be sent to using the select options or by point and click.
3. Once a list is created this can be named and saved in the Personal lists section or a previously saved list can be brought back by picking it from the list and using the read list button.
4. Next will allow you to type or paste the emails of any other people you wish to include.
5. Finally you can edit the title, provide message content and select the send address you want to use. When you press send PIAB creates an SMTP message for you which it sends to your recipients and copies to your home email account

Screens



Notes

This one step distribution of documents can be inhibited by the system administrator so if your 'Out (envelope)' or 'Send (envelope)' buttons don't light when you expect them to, the feature is inhibited. Creation of Appointments and Tasks follows the same pattern and can be used for checkout or send (copy) of files and documents if required. Saved email lists are purely personal and will only be visible to you as a library you take from project to project so if naming a project board list remember to include the project name so you can differentiate from the project board on other projects.

Your Email type Outlook or SMTP is set in the User Options form and applies to all your actions within the .NET Client.

Managing Document Notifications

Overview

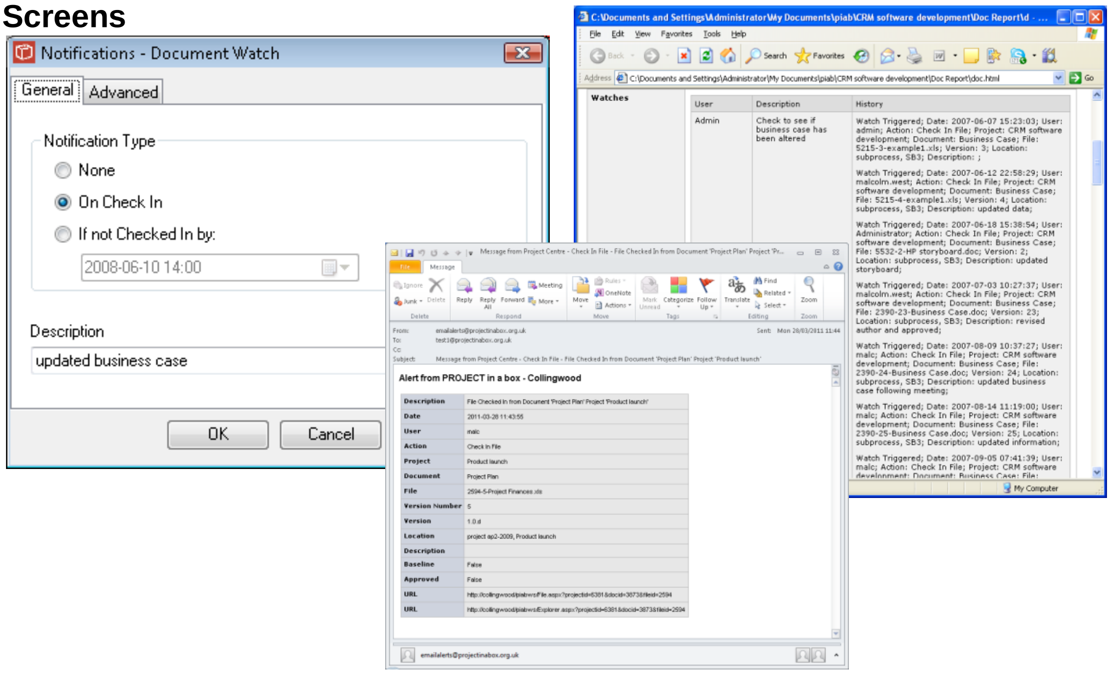
Usually as the Project Manager you want to be kept informed when things have (or haven't) been done. Notifications perform this service by sending users emails when files within the 'watched' document are changed, when no changes occur before a set Date/time or when approval state changes.

Notifications can only be set by Modify users on the project or Admin users from a PIAB Manager client. The Notification email received by the users includes lots of information about the activity including user, process, comment and also includes the direct URL links so the user can immediately see the new content (or the process where work hasn't been undertaken).

Steps

1. Set a Notification by selecting the document of interest in the file explorer or the Manage Documents and Notifications form and then clicking the notification link.
2. Select the type of Notification required:
   a. On Check In – Provide a description to be used in the email title and press Okay to complete.
   b. If not checked in by - Provide a description to be used in the email title and select the date/time then press Okay to complete.
3. A Notification can be suspended by selecting 'None' in Notification type.
4. If you want other team members to be notified with the same rule click the Other Recipients... link on the advanced tab to open the Communicate with other users form and select them there.

Screens



Notes

The History pane on the advanced tab shows the watches that have been triggered, when and by whom. The links at the bottom of the form enable users to clear their watches or all watches if they are an Admin user. The Project Document Status Report or Document report also shows an analysis of Watch results for all users.

Note that the 'on Check In' watch will work immediately from installation but the 'If not Checked in by' watch has to be set up as a service, please see the technical guide for further information. No Notification messages will be sent unless the SMTP settings have been added on the server and an active internet connection is available to complete the send.

The On Check in notification is triggered by an update to an existing file in the document, the addition of a new item (file or url) to the document or change of approval state for a file in the document.

Searching

Overview

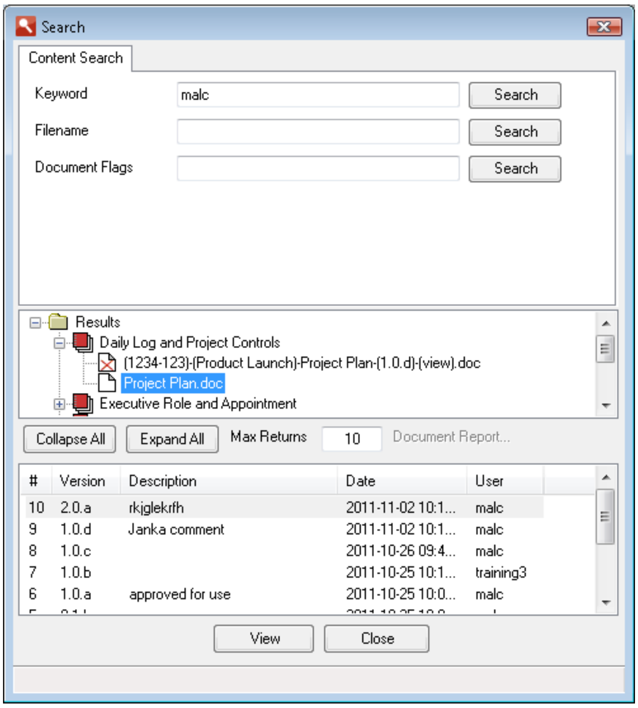
Searching provides you with an easy way of filtering the files in the project to find those which refer to something you are interested in.

You can search for key words in the content of the files, for parts of the file name or for the Document level flags set. You can then simply double click on items from the returned file list to view the file.

Steps

1. Open Search from the quick clicks menu
2. If searching for content within a file then type the word or words required in the Keyword field and press the search button alongside.
3. If searching for part of file names (e.g. .doc) add this in the Filename field and press the search button alongside.
4. If searching for document flags type in the flags field and press search alongside.
5. The results will be shown in the pane below and will be structured in the usual index type document tree.
6. The latest version of a particular file can viewed by double clicking on it in this tree. Document reports can also be produced if permissions permit (from a Manager Client).
7. When a file is selected the version history is shown in the lowest pane, this only shows the particular versions which contain the reference. Double click here to view the specific version.

Screens



Notes

Searching uses the windows indexing service or Windows 7 search (which also lies behind the windows explorer search) all searches are treated as ‘and’. A wide range of Microsoft file types can be effectively searched using this tool including all office templates in the standard P2ABC method templates and Outlook email (.msg) files. Note: Using macros in files prevents them from being searched.

If you want to then check a file out and make some changes to it you will need to go to the File explorer. Note that the latest version shown in the lower history pane is just the latest version to contain your search term. There may be more recent versions which no longer include the term.

Using the Risk Log or Register

Overview

The Risk log (or Risk Register) is an essential tool in delivering a project effectively and should be used to record, monitor and analyse the risks that face the project.

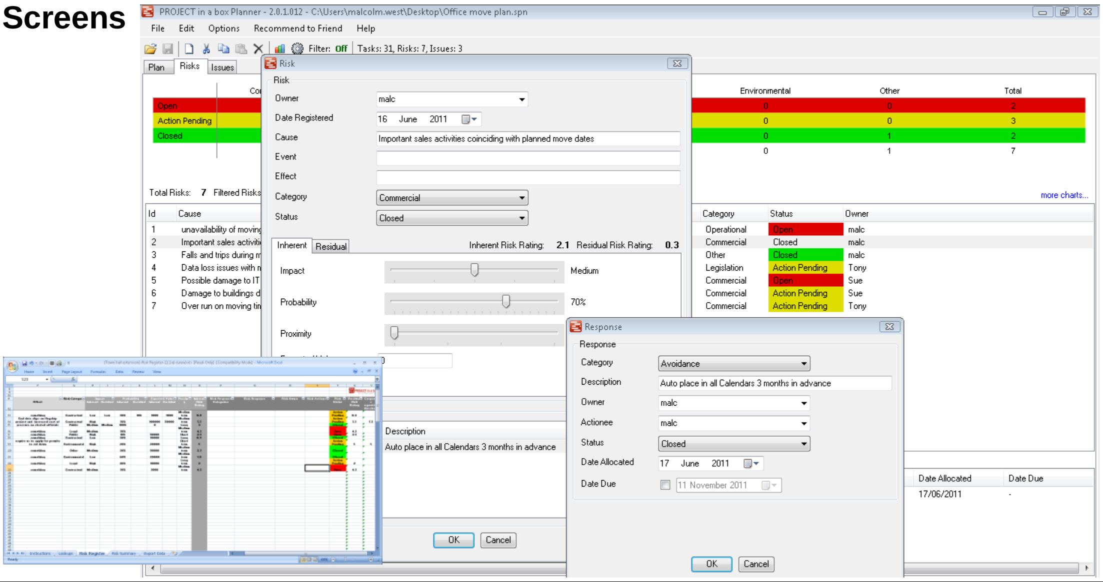
The default Risk Log has been provided as a Planner file.   Which can be used like any other file checked out and in and even emailed to other users to contribute to if required. An alternate Risk Register as an excel tool is also available on most projects in the Template library.

Project reporting can automatically extract data from the current version of the risk log if required to make it available for Risk management forms or reporting.

Steps

1. Access the risk log as you would any other file in the system (either as a view or a check out depending on whether you intend to make changes), it opens in Planner.
2. A manage lookups facility (file menu) enables the PM to customise the log, define the terminology and conditions they want to use for the project.
3. Risks are clicked to select their management form and there the details including responses can be added or updated. Sliders are provided for ease of entering data.
4. To help with management and analysis of the risks users can sort the data at the top of each column to or use the filters to select data with certain conditions.
5. The Risk Summary table is automatically updated and reflects any filters applied. The more charts link gives further analysis out puts and all can be exported for use in other documents using right click copy.

Screens



Notes

Try to always keep the risk log up to date and treat it as a live document rather than a log which is updated prior to reporting or project meetings. This way it becomes more useful to the casual/infrequent observer and more central to the delivery of the project.

If you want to customise the risk log use the lookups to add categories, statuses or change the calculational basis etc.

Using the Issue Log or Register

Overview

The Issue log (or Issue Register) is an essential tool in delivering a project effectively and should be used to record, monitor and analyse the issues that face the project.

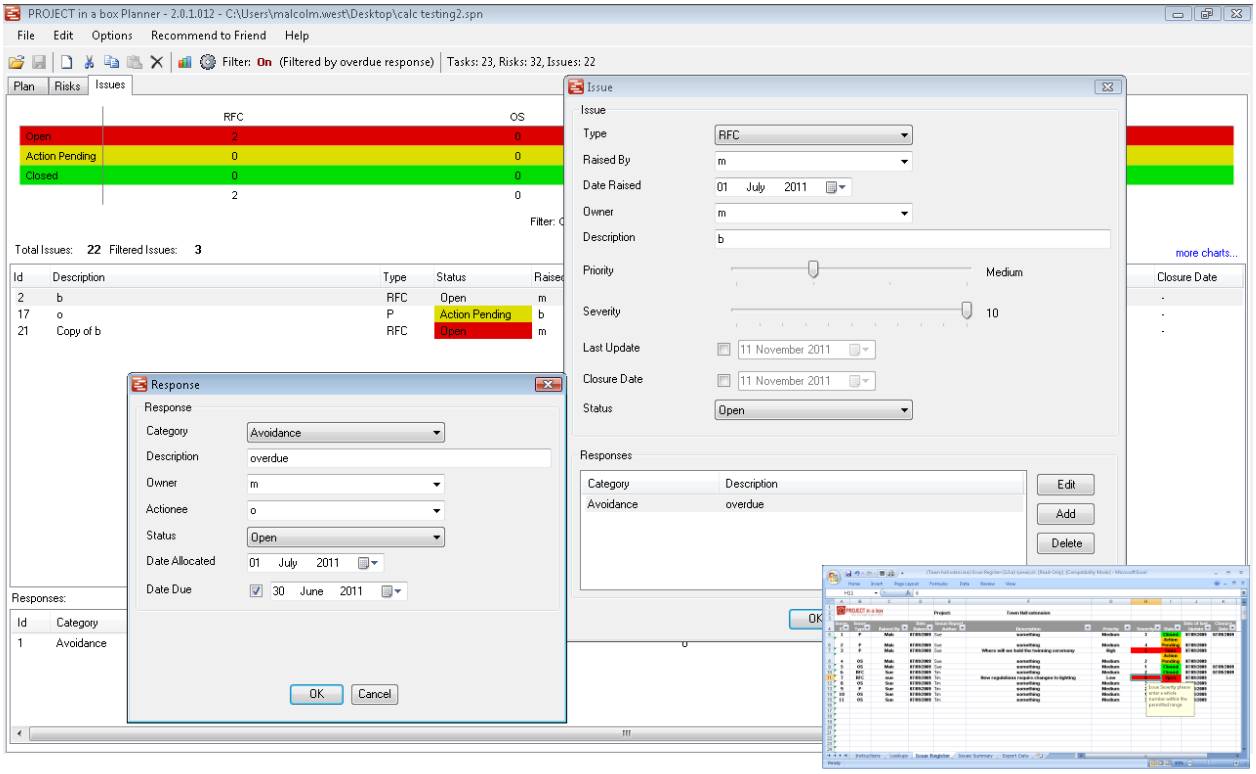
The default Issue Log has been provided as a Planner file.   Which can be used like any other file checked out and in and even emailed to other users to contribute to if required. An alternate Issue Register as an excel tool is also available on most projects in the Template library.

Project reporting can automatically extract data from the current version of the issue log if required to make it available for Issue management forms or reporting.

Steps

1. Access the Issue log as you would any other file in the system (either as a view or a check out depending on whether you intend to make changes), it opens in Planner.
2. A manage lookups facility (file menu) enables the PM to customise the log, define the terminology and conditions they want to use for the project.
3. Issues are clicked to select their management form and there the details including responses can be added or updated. Sliders are provided for ease of entering data.
4. To help with management and analysis of the Issues users can sort the data at the top of each column to or use the filters to select data with certain conditions.
5. The Issue Summary table is automatically updated and reflects any filters applied. The more charts link gives further analysis out puts and all can be exported for use in other documents using right click copy.

Screens



Notes

Try to always keep the Issue log up to date and treat it as a live document rather than a log which is updated prior to reporting or project meetings. This way it becomes more useful to the casual/infrequent observer and more central to the delivery of the project.

If you want to customise the issue log use the lookups to add types, priorities or statuses etc.

Using the Quality Log or Register

Overview

The Quality log is an essential tool in delivering a project effectively and should be used to record, monitor and analyse the implementation of quality testing on the project.

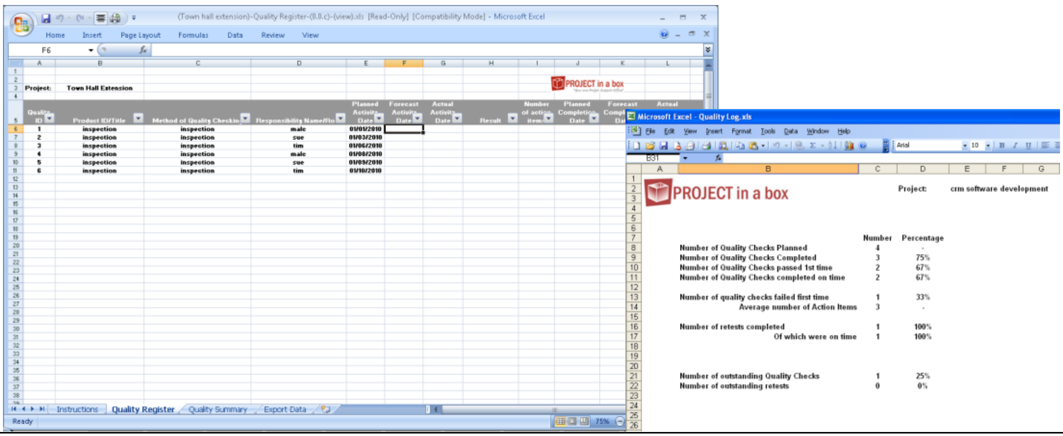
The Quality Log has been developed as a Microsoft Excel tool which makes it familiar for most users and also enables it to be managed like any other document in the system including being shared with external partners, then be attached back into the system (checked in).

Project reporting can automatically report summary statistics from the quality log if required. Since version 2.5 additional data can be extracted from the quality log including a full list of quality activities which can be presented in detail to reports at project and portfolio levels.

Steps

1. Access the quality log as you would any other file in the system (either as a view or a check out depending on whether you intend to make changes)
2. A lookups tab is available to help the PM set up the log, define the terminology and conditions they want to use for the project.
3. Quality tests should be recorded and updated on the quality Log tab in the one test per row format. Many of the fields here are constrained entry, meaning that when you click on them you will be forced to select an entry from a pick list. Other fields are free text and some fields may be locked to prevent accidental damage to the calculation cells below. Prompts and help and error messages will help you determine what to do in each column.
4. To help with management and analysis of the quality tests users can use the sort lists at the top of each column to refine the view to all tests that share a particular attribute or combination of attributes.
5. The Quality Summary tab is automatically refreshed as content is changed in the risk log and provides a statistical presentation of the testing situation for the project.

Screens



Notes

Try to always keep the quality log up to date and treat it as a live document rather than a log which is updated prior to reporting or project meetings. This way it becomes more useful to the casual/infrequent observer and more central to the delivery of the project.

Do not use cut and paste to reorder your Quality tests as you may damage the hidden calculations which support the quality summary tab and reporting output.

Using Project Finances

Overview

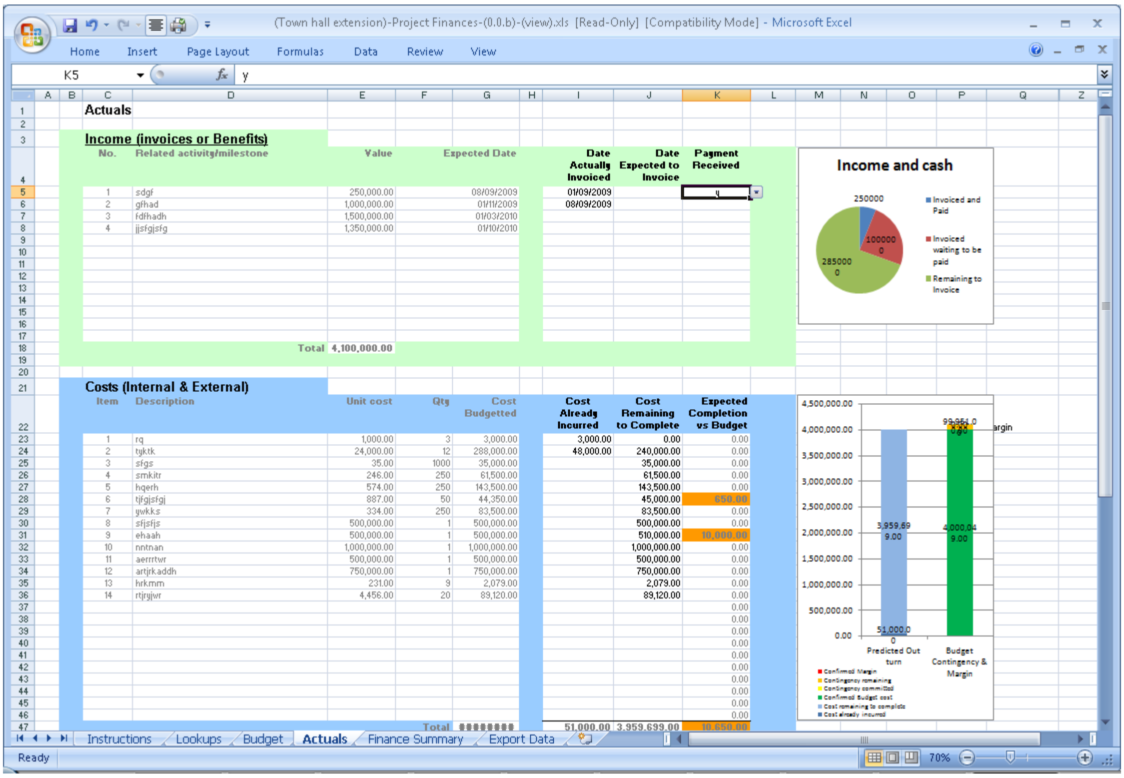
The Project Finances template provides you with a place to store and manage the costs and if necessary the income and profitability of your project. Provided as a spreadsheet it can be managed just like any other file on the project but if required summary data can be automatically extracted from it to be included in various of the reports.

Users who are not directly managing commercial projects with income, cash and profitability issues sometimes find it helps the project focus to create this effect by recording the benefits to be achieved by the project in place of the income.

Steps

1. Access the Project Finances as you would any other file in the system (either as a view or a check out depending on whether you intend to make changes)
2. Budget costs and Income (or Benefits) should be first set up in the Budget tab, along with the project contingency or change budget.
3. As the project progresses users can manage actuals incurred, remaining costs to complete and contingency changes in the actuals tab.
4. The Finance Summary calculates a standard analysis for the project finances based on Budget, Current and projected Completion. This tab is locked and the table here is reproduced into the reports where required.

Screens



Notes

Should you want to make changes to the format or calculations of this sheet you will need the password as all worksheets are locked. This can be obtained from the PROJECT in a box helpdesk.

Note that the Risk Log/register via planner has a section for calculating the expected value of impacts arising from identified risks that you might want to consider alongside the project budget or contingency.

The version 3.3 method templates support the extraction of the finance sheet charts into the project reports as standard using the new custom spread sheet reporting images capability.

Using Sales Funnel Data

Overview

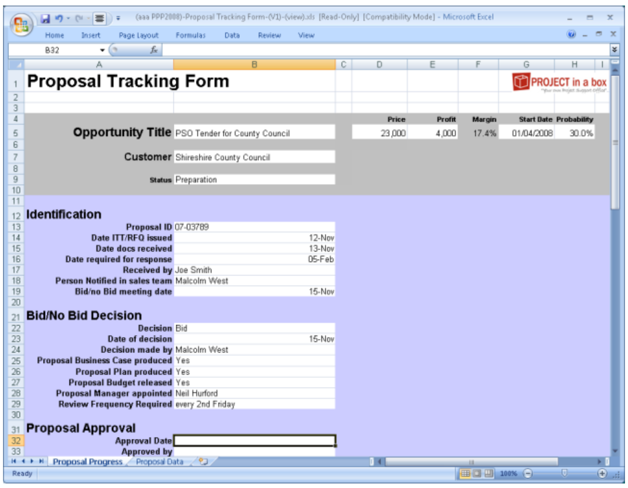
When using the Proposal Preparation Process (PPP) method template to manage multiple opportunities and responses with proposals, organisations usually want to have a good idea of timescales, conversion rates, values etc for these. This is frequently known as the sales funnel.

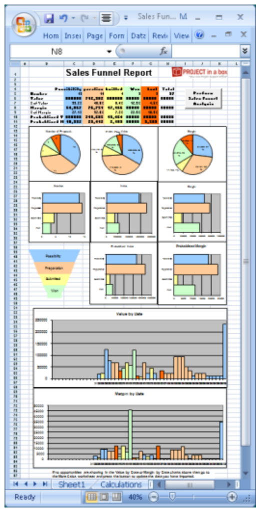
The PPP method is provided with a Proposal tracking form in the format of a spreadsheet. If this is kept up to date for each of the opportunities and linked as one of the standard data sources in the logs tab of the Project Summary Information Form (known as the Proposal Summary Information Form in this context due to the use of aliases) then a Portfolio user can run a Sales Funnel Report to produce a summary of the data in a sales funnel format.

Steps

1. Complete the Proposal Tracking form for each opportunity. Operated as a normal project file with view, check out and in functions.
2. Use the Proposal Summary Info form- Logs tab to assign the data source for use by the reporting engine.
3. Group the required opportunities together into a named Portfolio.
4. Operating as a Portfolio user with the named Portfolio selected run the Sales Funnel Report.
5. Sales Funnel Report is produced as a pair of spreadsheets, one data source and one output with macros to draw the data between them.

Screens





Notes

Try to always keep the Proposal tracking forms up to date with projected prices, margins, dates and probabilities as this report is likely to be run frequently.

It is possible to make changes to the Sales Funnel report format but please discuss this with the PROJECT in a box support team.

Using Project Plans

Overview

There are two levels at which plans are used by PIAB, firstly they are files and managed through add, view, check out and in like any other file.

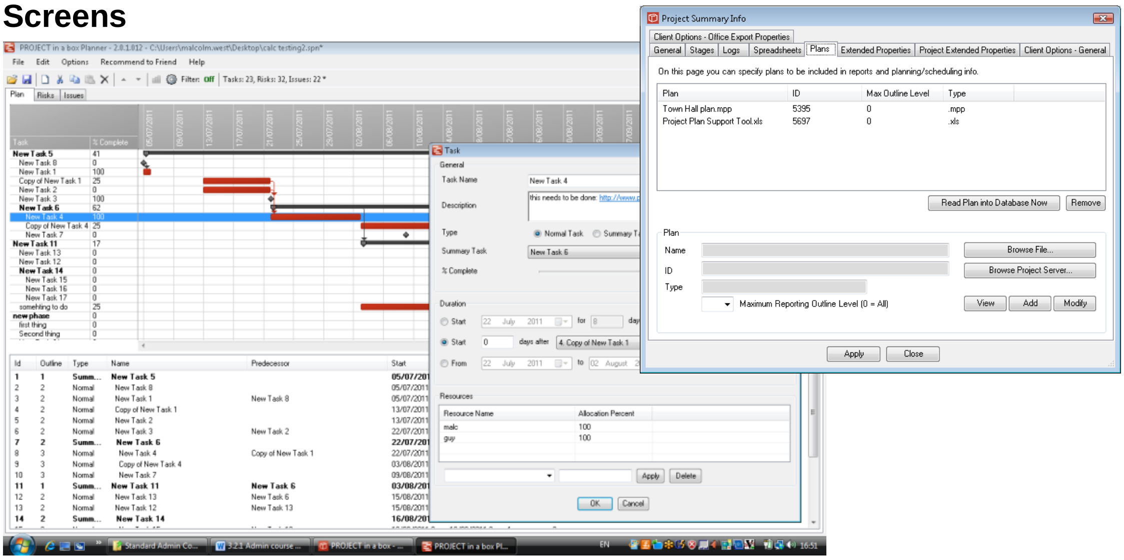
Secondly, where plans are identified in the Project Summary Information form as formal plan sources their data will then automatically be loaded into the planning database for a more complete analysis of task information across all projects including task status notifications and resourcing. This mechanism supports .mpp, .spn. or .xer file and also .xls or .xsl if they are in our required format.

The default templates provided in all standard methods are .spn files for use in the free Planner tool which is packaged into the software deployment client.

Steps

1. Ensure the Plan is saved as an appropriate file type within the project or that the appropriate server is available.
2. Using the Plans tab in the Project Summary Information, identify the source from which data is to be drawn; mpp, .spn, .xer, .xls or .xml using the browse file facility and then the add button, you can then use the add to database now to force a first read of the data in the plan. If your plan was provided as part of a template project it will have been set up and read in when the project was created.
3. Ensure that your personal options (reports tab) shows the appropriate version and location for the MSProject component to be used or the mpp plugin (essential where .mpp and .xer files are being processed).

Screens



Notes

Planner is provided as standard as part of the Software client and for browser client users can be set up from the resources page. If you want to give Planner to other people they can register from the PIAB website using the link you can send them from planner.

Planner has its own set of help material provided as video tutorials.

Dashboard

Overview

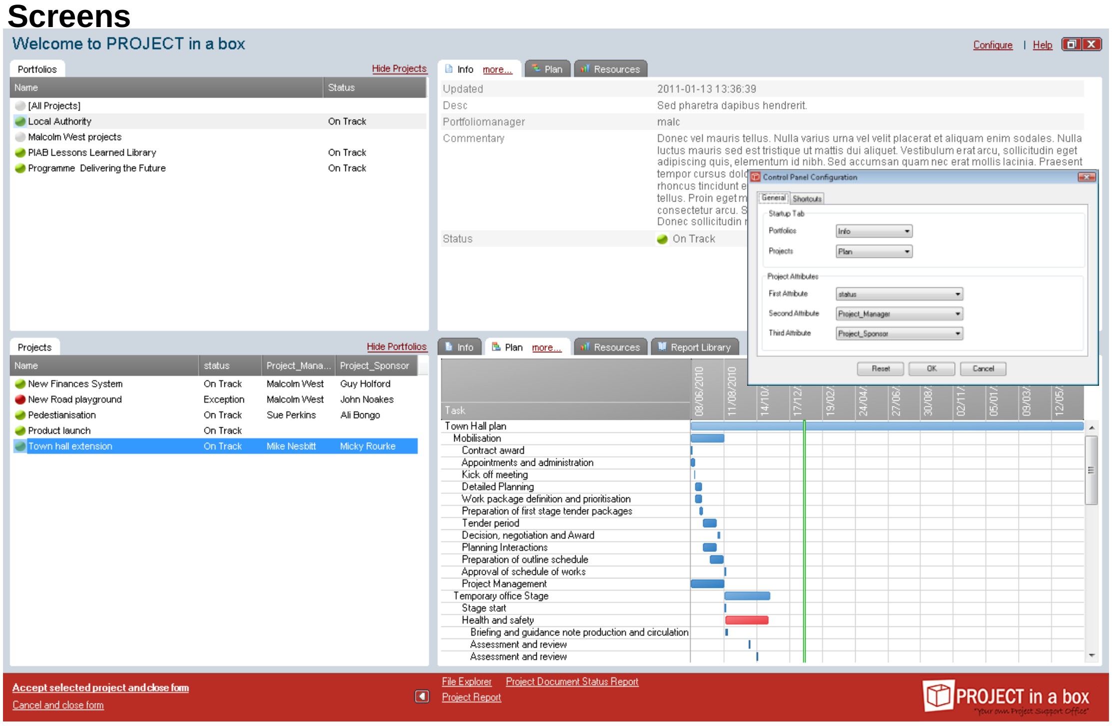
The Dashboard provides immediate access to key project and portfolio information, plans, resources and reports while you are browsing in the portfolio and project lists. If you want to know more you can open the display up or can jump to other parts of each project.

This centralisation and immediate access to content makes the dashboard the perfect access route for PMO or senior business users and as such it is only available with a manager licence.

Steps

1. Click the Dashboard icon to launch it will remember your favourite starting view at portfolio and project levels
2. Navigate in the left side to change Portfolio or project and the right side data will adjust to display for your selection.
3. Change tabs in the right hand side to alter the type of information presented at the project or Portfolio level.
4. Use the shortcuts in the lower bar to jump immediately to produce new reports or view documents as chosen (shortcut list available can vary by user)

Screens



Notes

Use the configure form to change the Attributes displayed, starting choices for the data tabs and the list of shortcuts to be used.

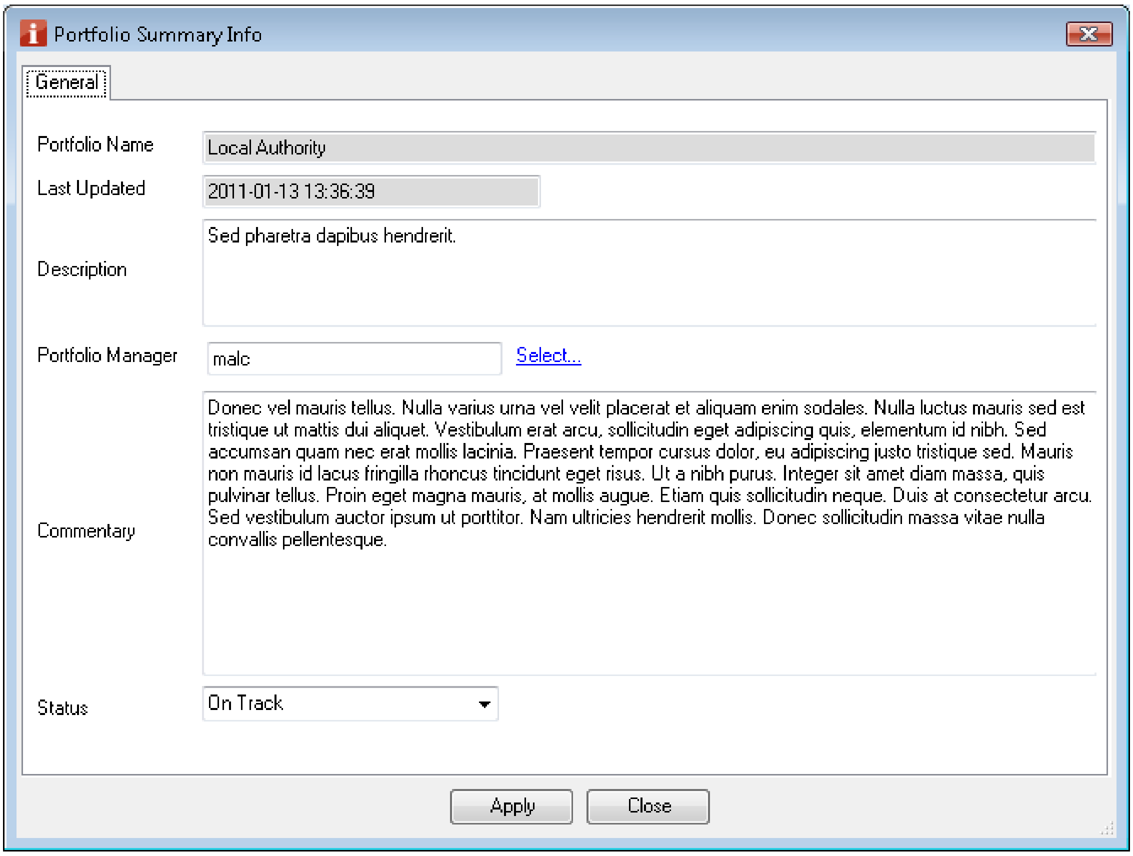
The show Dashboard option in the startup tab on the user options form will ensure that the dashboard is displayed when the application is started.

Portfolio Summary Info

Overview
The Portfolio Summary Info form enables the Portfolio user to add details about the status of the Portfolio such as description, commentary etc.

This data is then used by the reporting engine when assembling the Portfolio report

Steps
1. (when operating in the default Portfolio mode) Open the Portfolio summary form for the current portfolio by:
   a. Clicking on the Info Quick Clicks button.
   b. Using the Edit Portfolio details on the Summary information window.
   c. Main menu Admin- Portfolio Summary.
2. You may be able to view the contents of the Portfolio summary form but will only be able to edit it if you have specifically been assigned edit for that Portfolio using the Portfolio Management form.

Screens


Notes
Portfolio functionality is only available via a PIAB Manager client to users with Portfolio write permissions and operating in Portfolio view.

Project Summary Info – Overview and summary fields

Overview

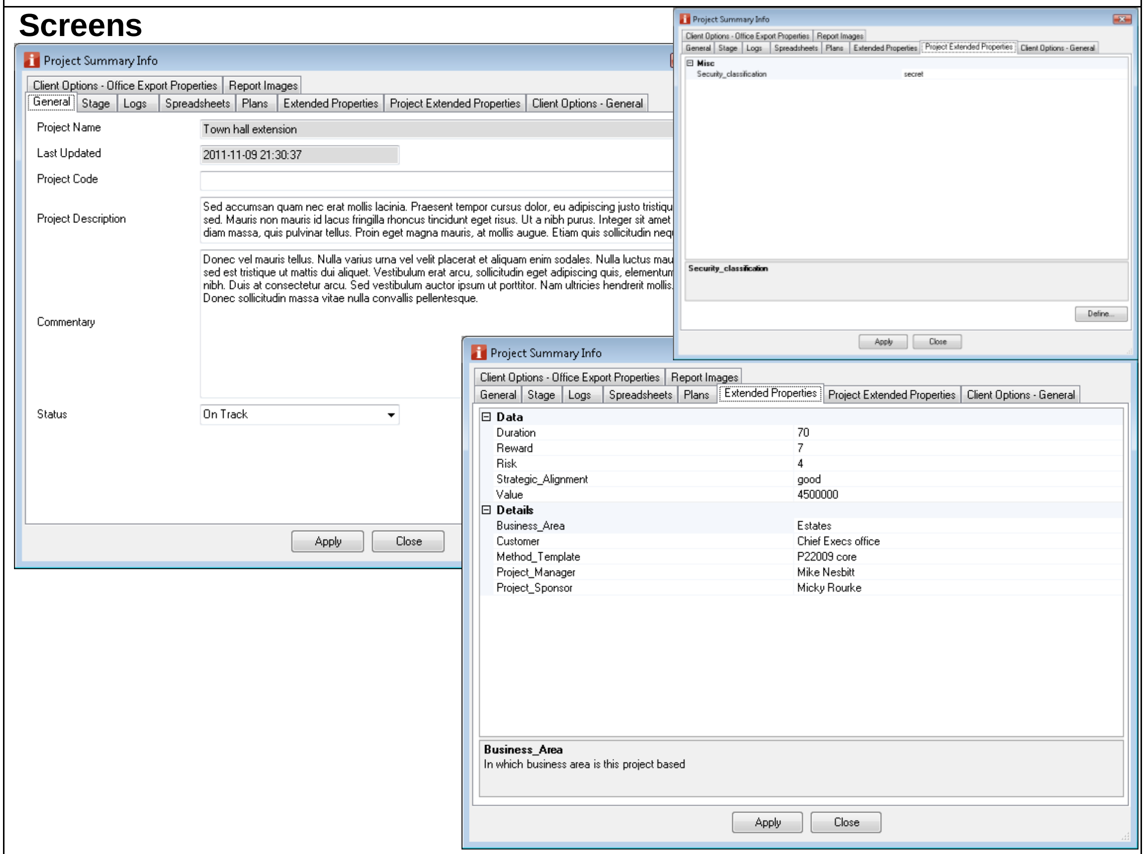
The Project Summary Information form is used by the project manager to set up reporting content and other key project information and options.

The window consists of a number of tabbed forms which are described in this topic and the several following ones. This topic covers the core project summary information and attributes

Steps

1. Both viewing and editing use the tabs to navigate and view content.
2. When editing the **General** tab use the various text boxes, pick lists and prompts to provide status on the project.
3. The **Extended Properties** tab shows the additional fields that are available to store information for the project as defined by its method template. Once populated these will be shown in project reports and available as attributes int eh portfolio/project pick list.
4. The **Project Extended Properties** form allows additional properties to be specified and then completed for just this project. To add new Properties use the define button at the bottom of the form.

Screens



Notes

Modifications here can only be undertaken by Modify users for the project or a Manager licence user delegated to have this capability.

The status pick list on the general tab is the source of information for the RAG reporting used in the Dashboard, Project and Portfolio reports.

The extended Properties tab shown here may differ from yours as it is controlled by the method template for the current project.

Project Summary Info – Standard Reporting Sources

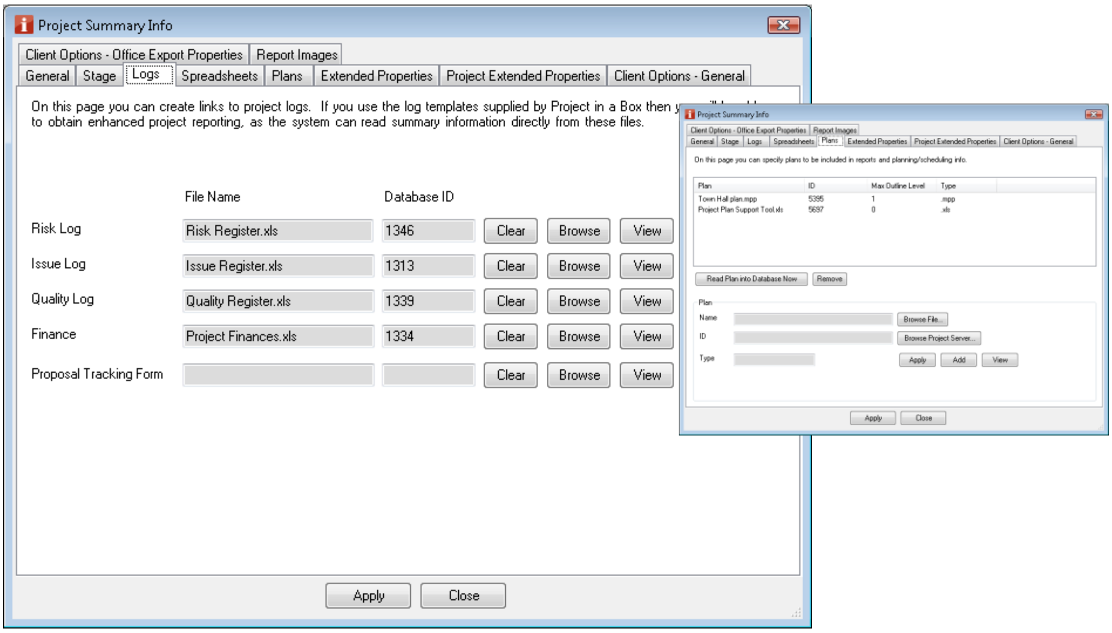
Overview

These tabs enable the project manager to define the sources for the standard reporting content which feeds the management reports. From version 3.1 Method templates have been provided which will automatically set up the typical reporting sources when the project is being created but it is still a useful step to check these and if custom sources are included such as additional plans or stage plans they will need to be added by hand using the process given below.

Steps

1. The Logs tab enables the PM to browse to the source file for each of the data types which are locked into place in the form in turn. Usually these will be different files i.e. risks from a Risk log.xls or a risk Register.xls. But on occasion these may all come from the same file i.e. a combined Daily log as on a small project.
2. The Plans tab enables the PM to define a number of plan files or sources of planning information to be used in reporting. Browse file links to a specific file within the project being one of the required format.

Screens



Notes

Source files must be .xls or .spn (for Risks and Issues) or for plans can also be .xer , .mpp or .xml and must be present in the projects document tree.

On most 2011 methods provided with version 3.2 onwards the standard logs will be .spn files.

Project Summary Info - Custom Reporting Sources

Overview

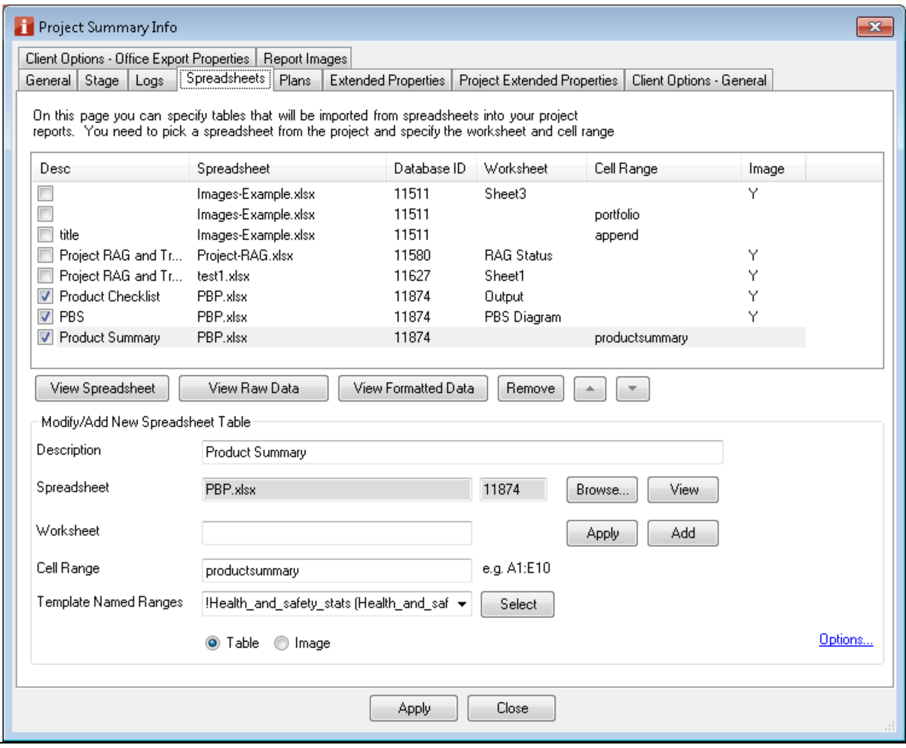
This allows the PM to identify areas of spreadsheets from within the project which they want to be included in the project reports this includes Data grids and images (only on excel 2007 or newer). Using this mechanism the PM can include custom analysis on important issues from their project which they have created themselves, consistently in project reports.

Examples include detailed project finance, recruitment, resourcing analysis exported from planning tools, project change logs, licence applications and a whole range of other technical and domain area data. This data can be shown at dashboard, project and portfolio levels.

Steps

1. Open the project summary form and select the spreadsheets tab.
2. Use the lower part of the form to select the specific spreadsheet you want to include the data from
3. When selecting Data for a table provide the named range or worksheet name and cell range required. Make sure these are spelled correctly (including capitalisation)
4. When selecting Images name the entire worksheet to include all images or the cell ref of the top left corner to include a single image.
5. Press the add button and the new resource should appear in the spreadsheet list.
6. Use the view raw data button to see what your selected definition will return.
7. View formatted data previews how it will look in he produced report.

Screens



Notes

Modifications here can only be undertaken by Modify users, if the PM is unavailable and has delegated report preparation to another project user, that user will need additional permissions during the period to modify the content of the project Summary Info

Careful use of this system enables data to be collected at the project level in spreadsheets and shown but also brought together at a portfolio level and shown following prescribed rules to list and order or add/average. To use this portfolio facility an ! must be shown before the names range such as “!keyrisks”, the named range must be specified in the method template and the rules set in the spreadsheet using a set of [special codes]. More details in the Knowledge base.

Further details on working with spreadsheets is available from the knowledge base:
http://projectinabox.org.uk/wiki/doku.php?id=3_3:kb0000390

Project Summary Info - Stage (Highlight) Summary Info

Overview

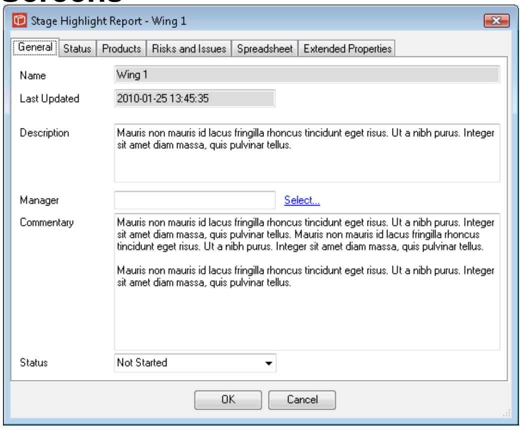
Much like the Project Summary information, a subset can be recorded for each stage if this is appropriate. Some of this stage summary Information is used as a hardwired source of data for the reports and dashboard, other parts of it can be replaced by a source spreadsheet to allow the information in each stage to be customised.

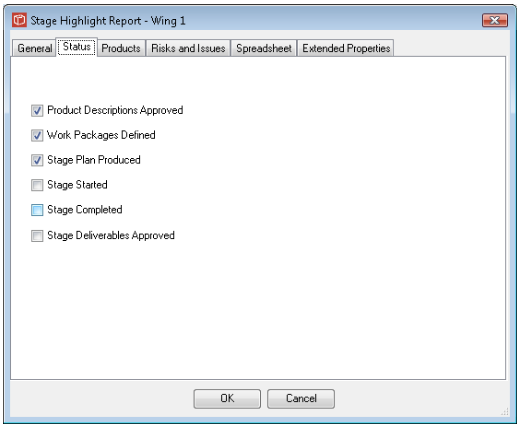
The Stage summary information form is accessed from the Project summary information form, stages tab by selecting the appropriate stage and clicking on it. 'Stage' here can be aliased by the method template so may appear as 'project', 'sub-contract' or some other term if altered to reflect a different methodology.

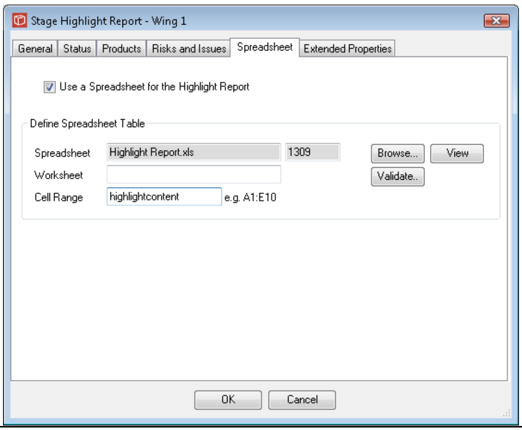
Steps

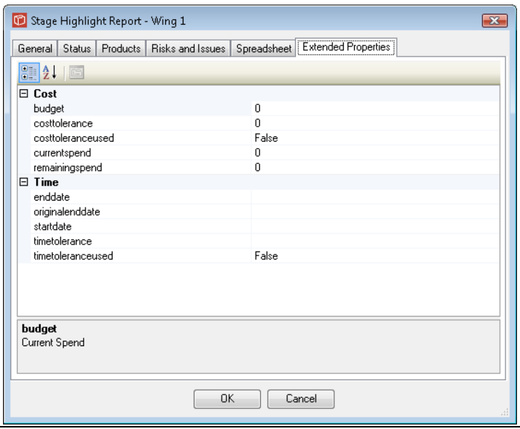
1. Both viewing and editing use the tabs to navigate and view content.
2. Use the Spreadsheet tab to replace the standard Stage content with a spreadsheet content instead. The reporting will then pick this up as an alternate source of data for the stage/highlight elements of reports. Note: this does not replace statuses which are still obtained from the General and Status tabs for RAG & Dashboard.
3. When editing use the various text boxes, pick lists and prompts to provide status on the project stage.

Screens









Notes

Modifications here can only be undertaken by Modify users, if the PM is unavailable and has delegated report preparation to another project user, that user will need additional permissions during the period to modify the content of the project Summary Info.

This information relates to a single Stage so with a multi stage project these can all be different for example one could be drawn from a custom spreadsheet while others were drawn from the form.

Note the extended properties and Status questions are under the control of the Method template for the project and may differ to that shown here.

Project Summary Info – Client Options and Report Images

Overview

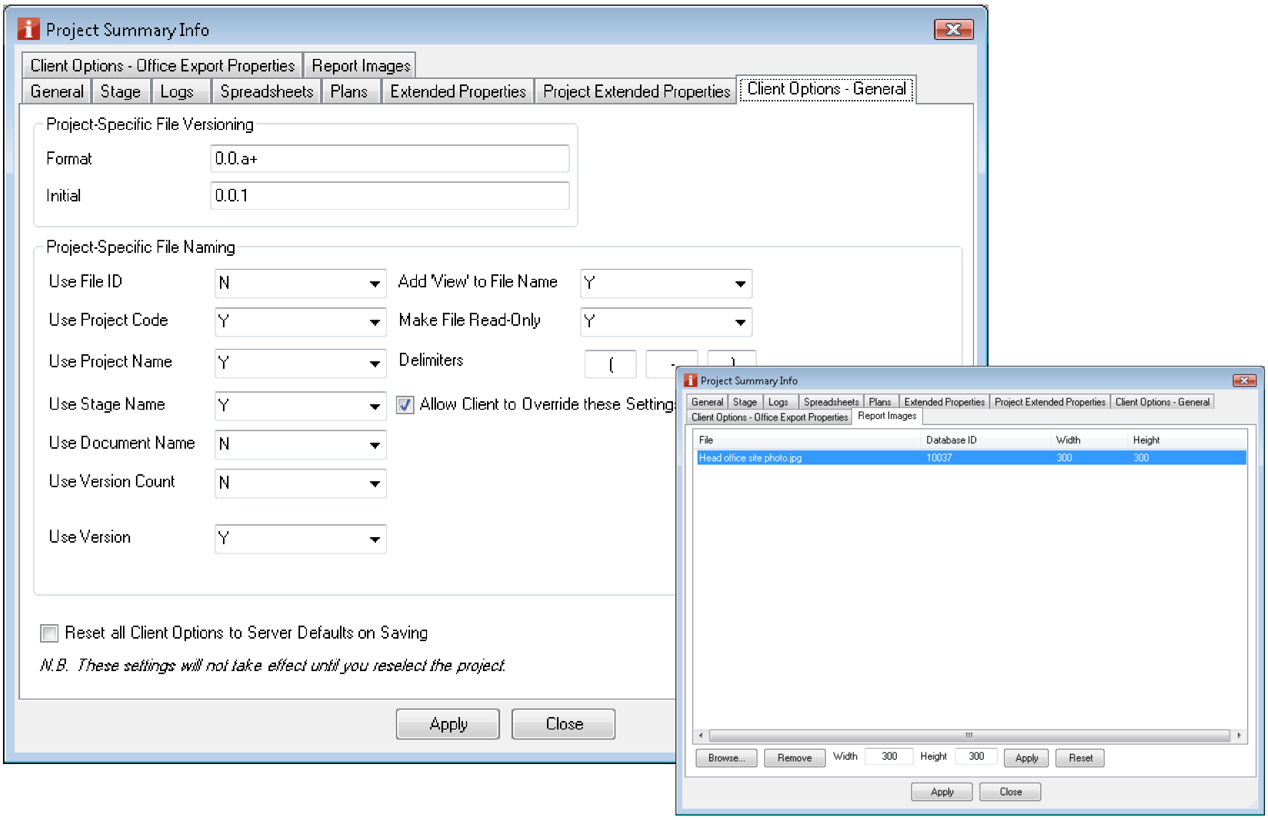
When a Project is created decisions are made about it's version numbering format and File naming conventions. If these are defined in the method template they then those are applied, if none are then the default server settings are applied. This is termed the project inheritance. Using this Client Options form the PM can see the inherited settings the project is using and can if they want, edit these for this particular project.

The Report Images tab allows the PM to select image type files from the project which will then be automatically included into project reports.

Steps

1. In File versioning the PM can set the format of the numbering and it's starting position
2. File naming allows the various elements to be switched on or off (note the Project Code is entered in the General Tab) and delimiters to be set. Use of an additional tick box enables the PM to delegate file naming decisions to the project team members if required.
3. The Other area allows Email integration to be restricted or forcing of non-blank descriptions for the project.
4. Final option is to revert to the server settings at any time.

Screens



Notes

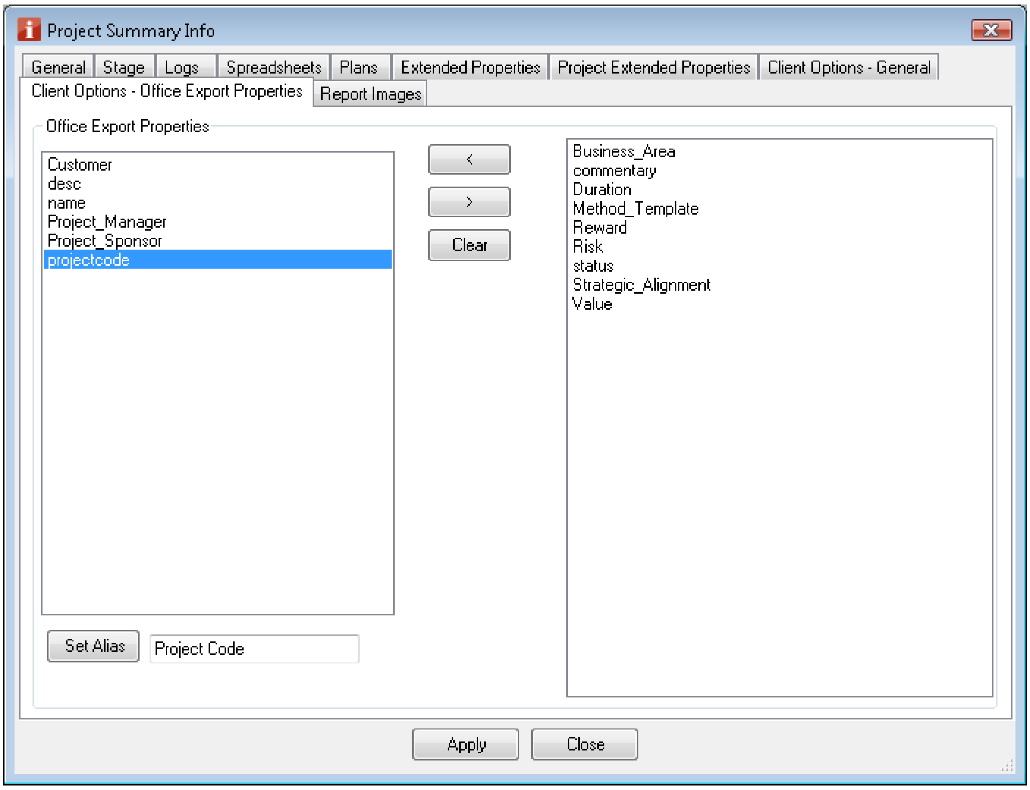
This form is designed to be used at the point when the project is created not mid project as any changes to file naming or numbering rules may prevent files already checked out from being checked back in. Note these setting changes won't take effect until the project has been reselected.

When selecting report image files from within the projects files the default size will be used unless a custom size is set here.

Project Summary Info – Office Export Properties

Overview
When a file is checked out by a user, PIAB can automatically insert a number of the project's attributes into the Office Doc Properties. This capability means that standard project templates can include a field called 'Project Name' and then once this is put into a new Project it will be auto inserted/updated into every file checked out of the project.

Steps
1. The list of available properties/attributes is drawn from the extended and project extended properties and the general fields. Note for long text fields only the first 256 characters will be taken.
2. The left right and clear buttons are used to select the properties required for export into the left side of the form.
3. When inserted into the office file any underscore characters will be replaced with a space.

Screens


Notes
Note that changes will not be reflected into checked out files until the form has been saved and the project reselected.

Project Report

Overview

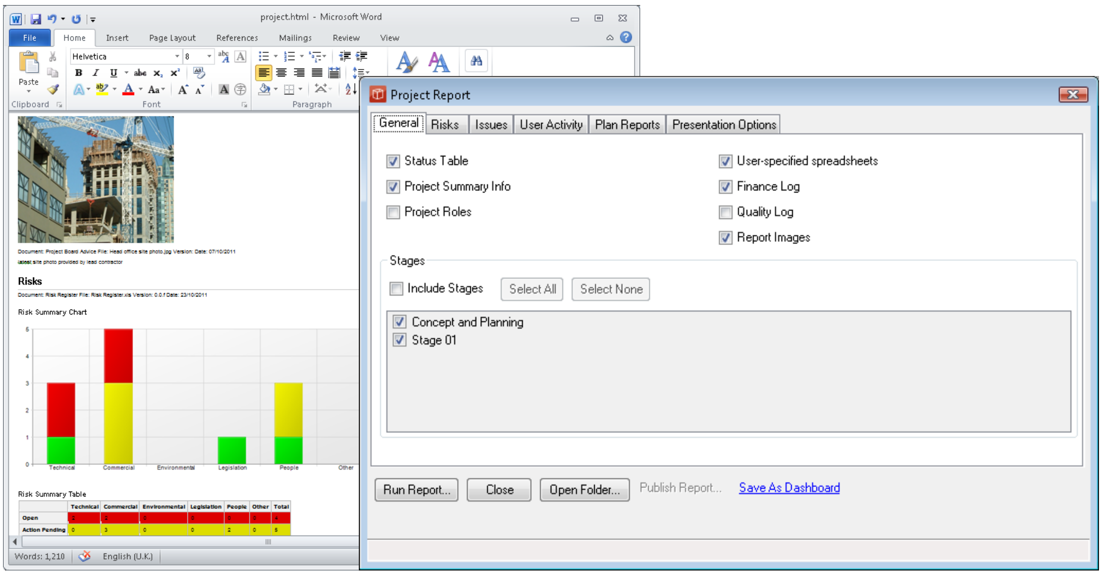
Project Report allows users with a Manager licence to create reports containing a range of information which can then be printed to hard copy, published to an intranet or distributed by email covering their current active project.

The report production form is like a wizard enabling the user to select the report elements they require prior to production.

Steps

1. The Project report form is accessed from the Main Menu – Reports – Project Report.
2. Simply use the tick boxes to select the information from the various tabs you want including in the report and then press OK.
3. When statistics from the logs or user specified spreadsheets are required the current version of the file will be used as the data source. Plan data will be loaded from the database.
4. User activity information is extracted from the database server side and built into images and statistics that are then published in the report.
5. Once the report is produced it can be scrolled through to reach the required section
6. Once the report production and packaging is complete the Publish Report link will become active on the report form this can be used to quickly and easily share reports with other team members (see Report Publishing).

Screens



Notes

All the elements of the report can be switched on or off to give complete flexibility over the content produced into the report, including filters and settings on risks, issues and the various plan displays (Gantt, resource chart etc). Two standard PIAB report display types are available the Default provides full detail and sequential display providing a comprehensive output. The Poster style is abbreviated into a matrix suitable for providing single sheet A3 reports. With a knowledge of HTML technology you can customise your own additional report structures and styles.

A link is shown against each element of the output report which is derived from a file in the project. The link is a PIAB URL which any recipient of the report can click, whether they can view the source file will then be dependent upon their permissions. If producing this report into word you can then edit the content including adding in your own commentaries before printing or saving to Word or PDF for onward distribution.

Project Document Status Report

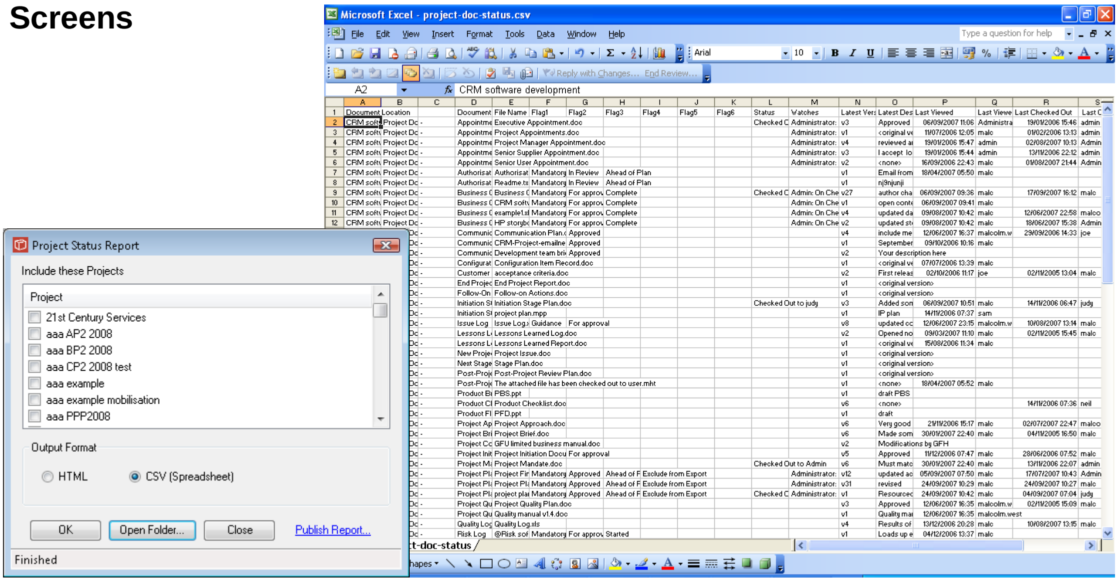
Overview

Project Document Status Report allows Modify or Admin users with Manager licence to present a wide range of status information about the documents and files in the project. Two presentation formats are provided, either a fixed HTML report or an export to CSV which users can then reorder themselves with spreadsheet tools.

Steps

1. The Project Document Status Report form is accessed from the Main Menu – Reports – Project Document Status Report.
2. Simply select the output format required and whether the report should be for the current project or all projects.
3. Once the report production and packaging is complete the Publish Report link will become active on the report form this can be used to quickly and easily share reports with other team members (see Report Publishing).

Screens



Notes

Admin users can run this for a range of projects, normal users with a Modify permission may run this for their current project.

Portfolio Report

Overview

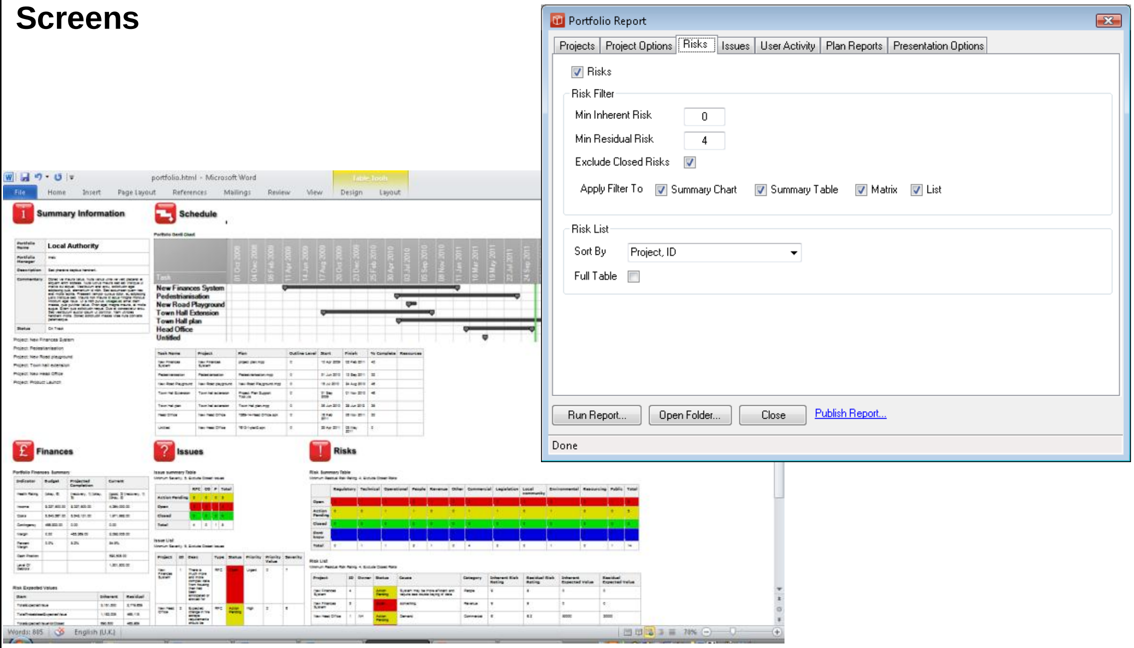
Portfolio Report allows users with a Manager licence and a Portfolio permission to create reports containing a range of information merged from a chosen set of projects within the current portfolio.

The report production form is like a wizard enabling the user to select the report elements they require prior to production and is very similar in format to that used on the project report, in fact all the same items can be selected.

Steps

1. The Portfolio report form is accessed from the Main Menu – Reports – Portfolio Report Must be a Manager licence and a Modify user, operating in Portfolio mode)
2. Select which projects from the portfolio you want to include (attributes can be viewed to help you decide).
3. Simply use the tick boxes, filters and other choices to select the information from the various tabs you want including in the report and then press OK.
4. Data will be drawn from database or current version of the various files held as required and merged from the underlying projects.
5. User activity information is extracted from the database server side and built into images and statistics that are then published in the report.
6. Once the report is produced it can be scrolled through to reach the required information. It will have also produced project reports for all of the constituent Projects selected in the portfolio and these can be browsed to by clicking on the RAG summaries.
7. Once the report production and packaging is complete the Publish Report link will become active on the report form this can be used to quickly and easily share reports with other team members (see Report Publishing).

Screens



Notes

Notes are as per Project report earlier. Again two report structures/styles are available and you can create your own custom ones if required.

The Project Summary Data Report allows you to utilise the Project extended properties to collect any data you wish about your projects and then analyse these across a portfolio. The data is drawn out by the system into a csv data file and then an excel report is launched to extract, analyse and present the data. The standard set of Extended properties tie up with the shipped report to provide a business value portfolio analysis. By customising the Extended properties with Method Manager and modifying the excel report you can create any custom analysis here you wish. Alternatively the PIAB team can do this for you.

Document Report

Overview

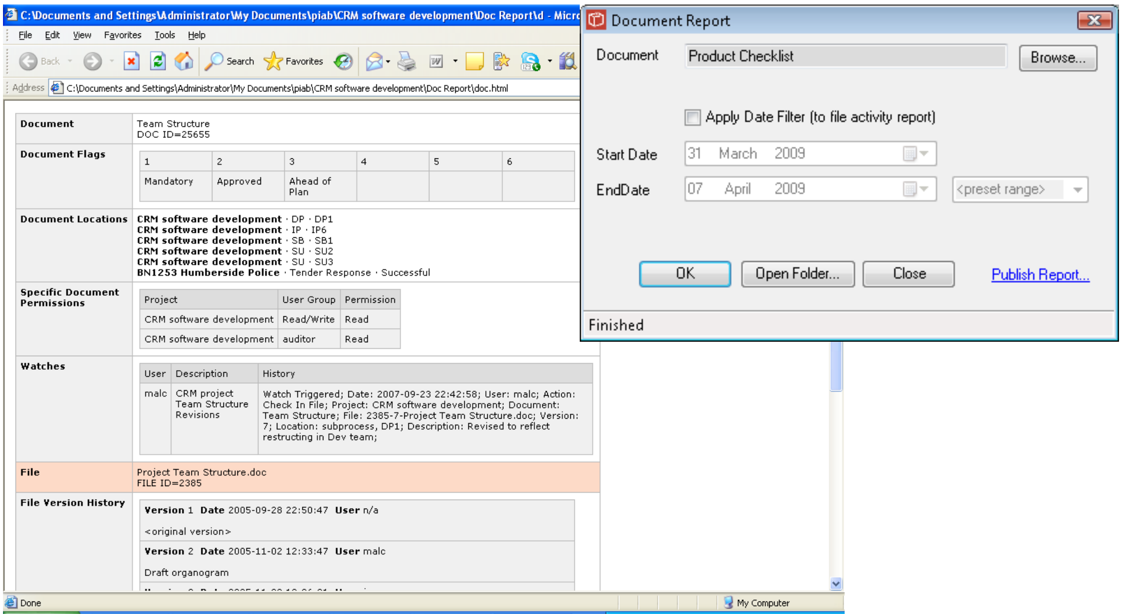
Document Report allows users with Manager licences to create HTML reports containing detailed audit information about the usage and changes to a particular document in the active project.

This report is a standard format presenting all the information on a file by file basis.

Steps

1. Usually activated with a right click on the required document but can also be selected from main menu- reports – Document report, or from other locations where it is often useful, such as Search, My Details (recent files) and set document permissions.
2. Pick a user activity date range if required (only from main menu) then press okay.
3. User activity information is extracted from the database server side and built into images and statistics that are then published in the report.
4. Once the report production and packaging is complete the Publish Report link will become active on the report form this can be used to quickly and easily share reports with other team members (see Report Publishing).

Screens



Notes

For those with HTML and CSS skills changes to the report template and master.css file can give the reports a look and feel more in keeping with the organisation including inserting logos etc. The reports tab in user setting form enables the user to request whether the report should be produced as HTML or MHTML and the application to publish this to i.e. Winword.exe.

If any of the requested content was unavailable at the time of production a warning box will be shown to you before the report is published to the screen.

All the files required to reproduce your report (essentially a mini website) are packaged into a folder with the report name and the date/time of production in the file name and placed in the defined reporting location. This can be set via quick clicks options but the default is in your project checkout folder. You can access the report storage folder from the Open Folder… button on your Project report form or via the check out folder link to view old reports.

The user activity statistics here show you for your selected time period exactly which users viewed or checked out each specific file in the document. You can use this for audit purposes or to check if users have viewed their appointments, risk logs, work packages or other key documents.

User Activity Report

Overview

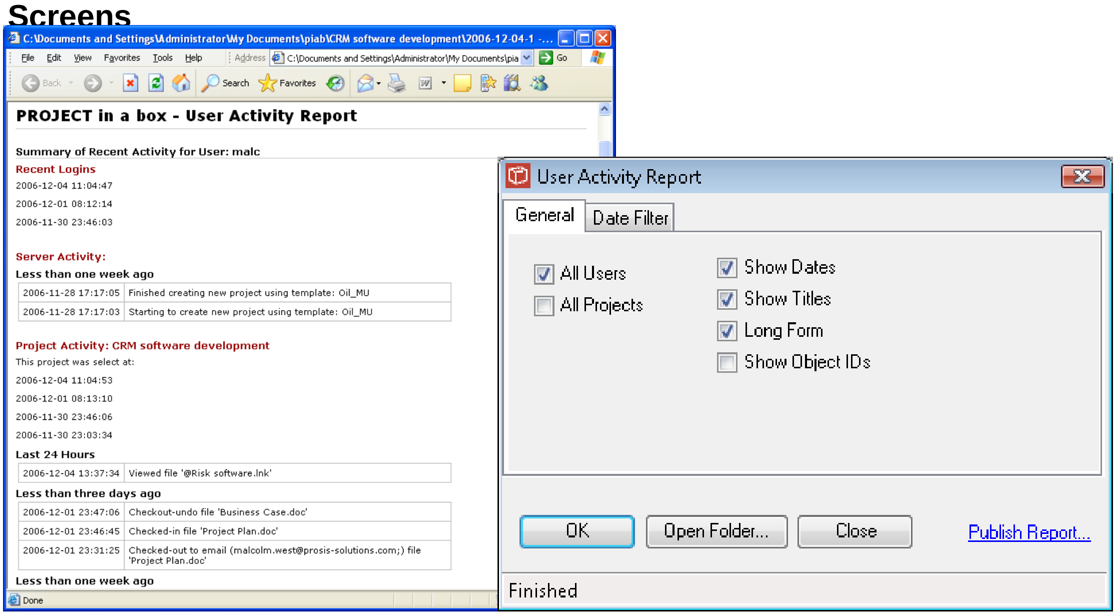
The User activity report allows a Modify user to see the activities of all other users on their project over a defined period. This provides a complete view of the Server activity (administration) or Project Activity (general user actions) on the project by user for the period selected. The information is grouped by user and then into timeframes (24, 72 and greater hours etc.)

This report is a standard format and can only be accessed from the main menu > Reports > User Activity reports menu item on a Full Professional client by a user who has default level modify permissions on the current project. The report will only run with the ‘All Users’ and ‘All Projects’ options selected if the user has admin permissions.

Steps

1. Select the report from the report menu.
2. Use the wizard to select the options required and a time filter if appropriate (default time is entire life of the project).
3. User activity information is extracted from the database server side and then published in the report.
4. Once the report production and packaging is complete the Publish Report link will become active on the report form this can be used to quickly and easily share reports with other team members (see Report Publishing).

Screens



Notes

For those with HTML and CSS skills changes to the report template and master.css file can give the reports a look and feel more in keeping with the organisation including inserting logos etc. The reports tab in user setting form enables the user to request whether the report should be produced as HTML or MHTML and the application to publish this to i.e. Winword.exe.

All the files required to reproduce your report (essentially a mini website) are packaged into a folder with the report name and the date/time of production in the file name and placed in the defined reporting location. This can be set via quick clicks options but the default is in your project checkout folder. You can access the report storage folder from the Open Folder… button on your Project report form or via the check out folder link to view old reports.

The user activity statistics here show you for your selected time period exactly which users viewed or checked out each specific file in the document. You can use this for audit purposes or to check if users have viewed their appointments, risk logs, work packages or other key documents.

What’s Changed? Report

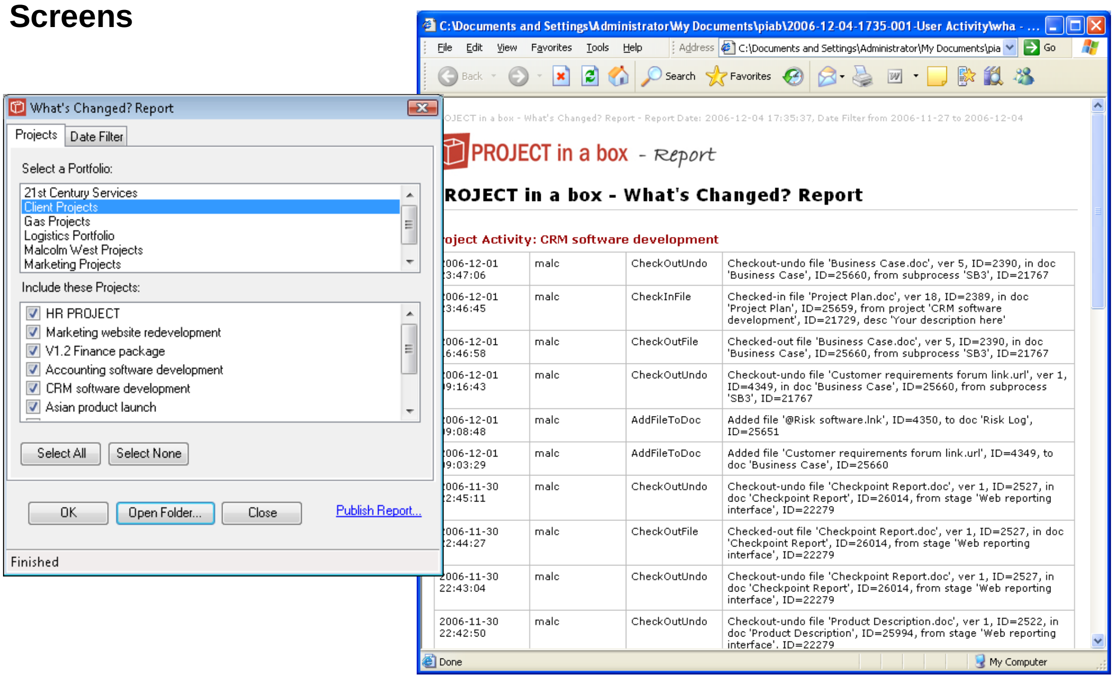
Overview

The What’s changed report provides a full list of all changes made to the selected project(s) in the defined time range. This report can be run by a user with Admin permissions against any project (or all) or by a normal user on any project they have Modify permissions on.

Steps

1. Select from Main Menu > Reports >What’s changed?
2. Pick the projects you want to run this for, this can also be run for an entire portfolio if required.
3. Pick the time range you are interested in (default is the full length of all the projects) and press OK.
4. The report is published in HTML for you to view, print or publish.
5. Once the report production and packaging is complete the Publish Report link will become active on the report form this can be used to quickly and easily share reports with other team members (see Report Publishing).

Screens



Notes

The output provided here is designed for Admin use and as such lacks some of the styling of reports intended for wider circulation but provides full details on the actions of users in the period.

If your personal options are set to publish to Word then the find facility can be used to quickly find particular docs, references or other items of interest.

User Administration Report

Overview

The User Administration Report provides the administrator with a helpful tool when managing large numbers of users and projects.

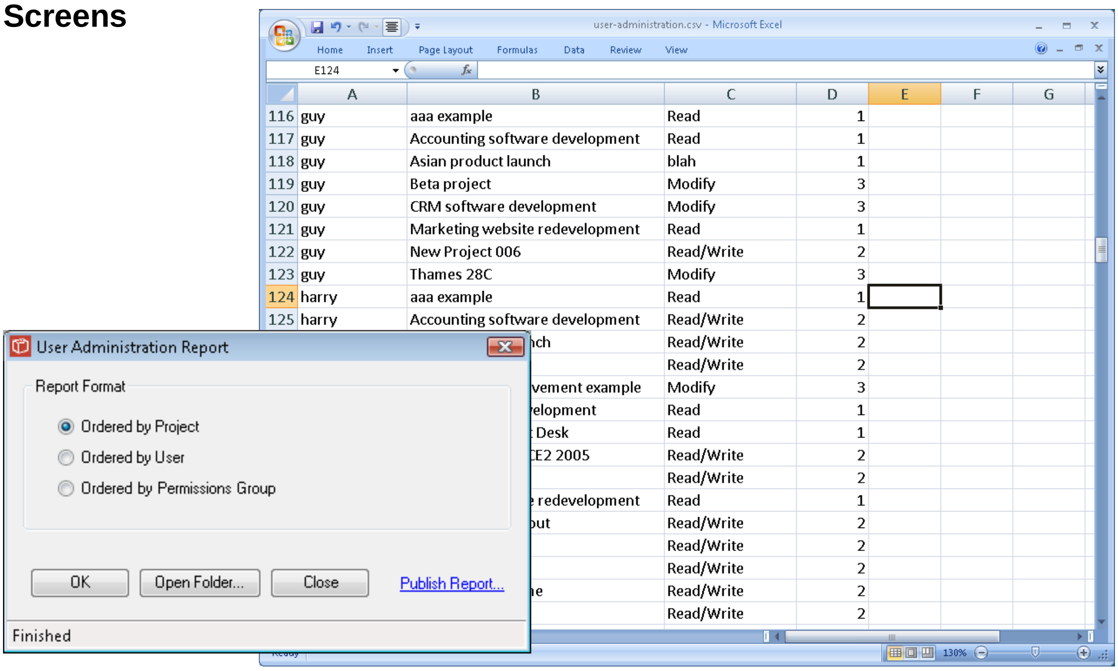
It provides the Administrator with a way of outputting all the permissions information about users on projects out to CSV for sorting where custom questions need to be answered.

The report is only available to an Administrator user from a Manager Client.

Steps

1. Select the report from main menu bar.
2. Using the form shown below identify the type of ordering you want for the exported information and press OK.
3. The data is provided as a csv file which will usually open in Excel where you can sort it as required for your admin purpose.

Screens



Notes

Project Dashboard Report

Overview

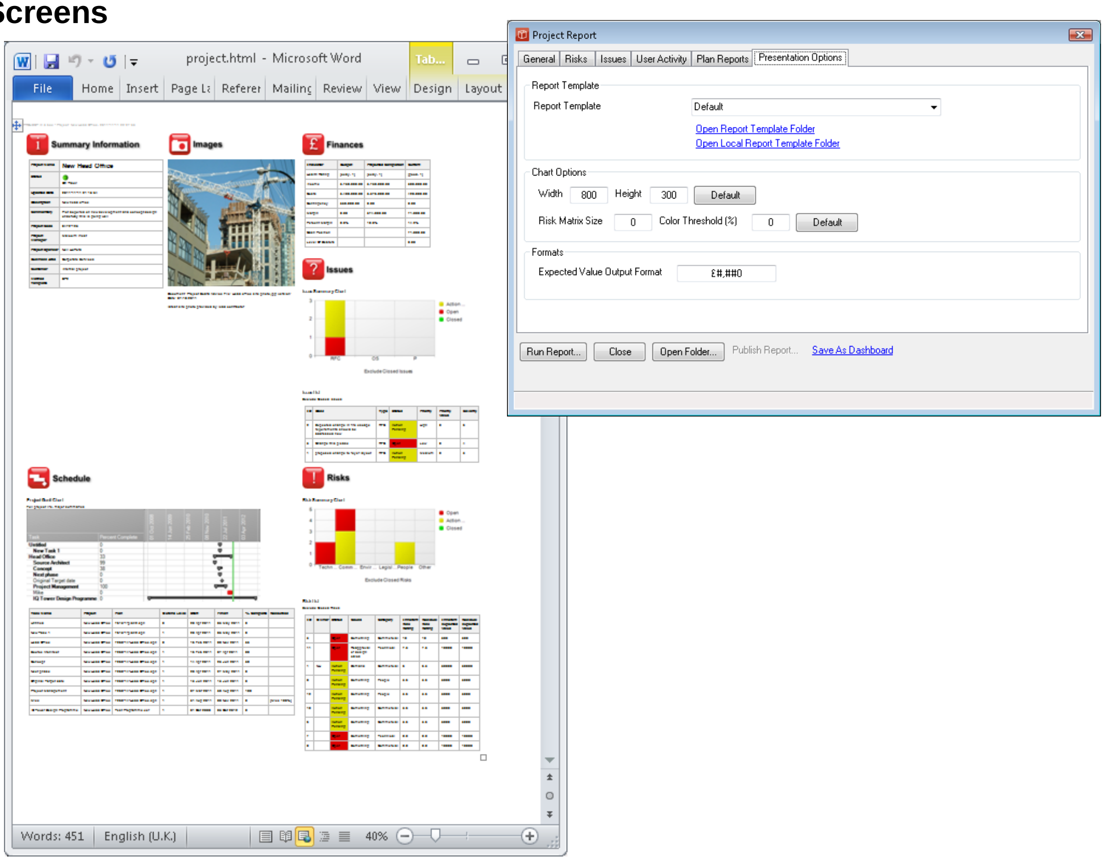
The Project Dashboard Report is a saved version of the Project Report. Once you have a project report set you want to produce again and again simply use the save as dashboard facility and the entire current configuration will be saved including the items switched on and off, the filters, sizes colours and which report style/structure is being used. This whole set can be invoked for on the current project at any time by selecting Project Dashboard report and it will run. No other settings need be adjusted.

This report is only available to a Modify user on the project from a PIAB Manager client and accessed from the side menu on the Dashboard quick clicks icon.

Steps

1. Use the standard Project Report wizard to prepare the set of date you want to include in your project Dashboard and then click the 'save as dashboard' link in the bottom of the form.
2. Run at any time from reports menu, Dashboard side menu or the Dashboard itself it the option is chosen in your configuration of the dashboard.

Screens



Notes

As the dashboard runs without a host form or wizard it cannot be immediately published or modified in the way that the other management reports can be. If modifications are required use the project report and select your required options. If publishing is required use the self publishing mechanism as the report will have been produced in your reports folder in your installation profile.

Once you have set a dashboard favourite it will be saved to your server stored profile when you next log out and can then be used to drive your single press dashboard report production in the Browser client.

Report Publishing

Overview

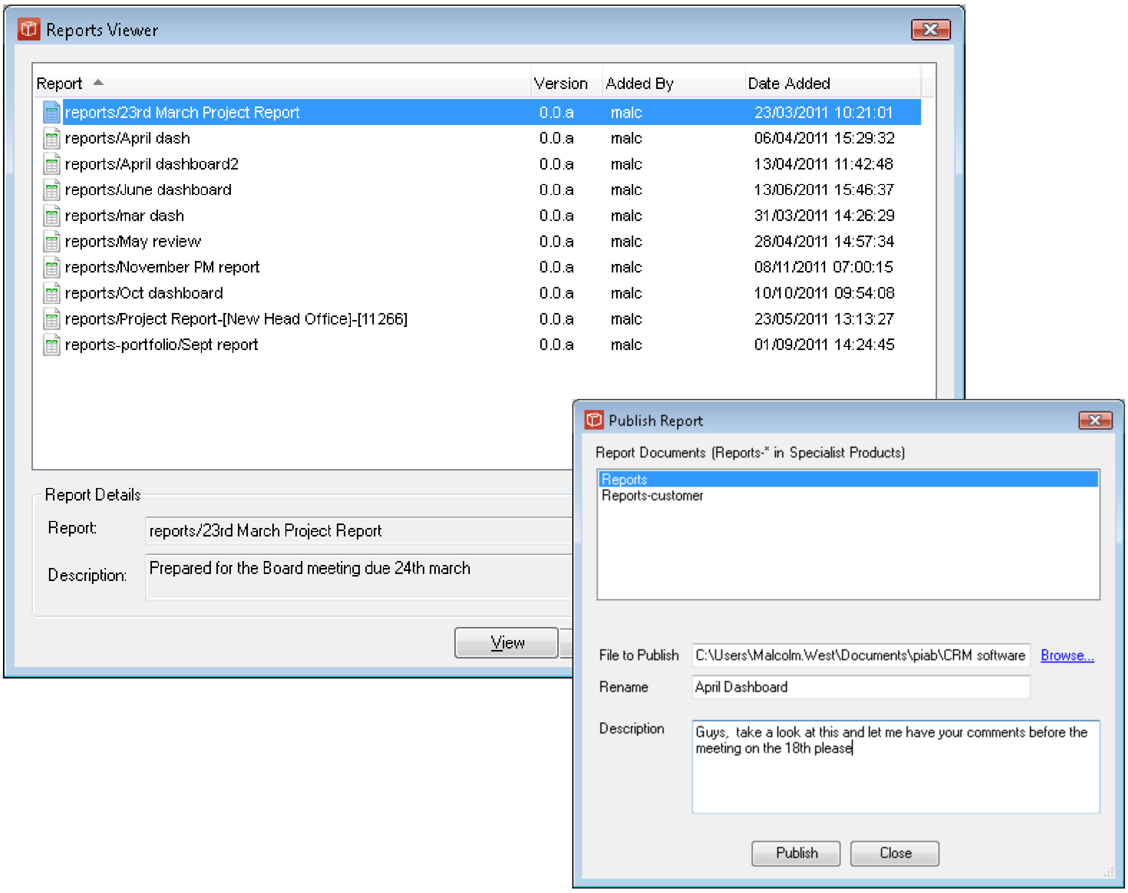
PIAB provides a standard pattern to make your report publishing easy, quick and controlled. Using either the Publish report link or the menu item, the Publish Report form is opened which enables you to package and add your report as a new file into a choice of report documents (held in specialist documents). Reports here are treated like other files and document level permissions can control which users see which reports; notifications can inform users when reports are available to view and new Reports folders can be added using the add new document control etc.

Users can then access reports to view directly from the documents in specialist folders or via the Reports library feature in The Enterprise Hub which presents these in a more accessible format.

Steps

1. Open the Publish Report form either directly from a Report wizard or from the main menu->reports menu link.
2. When publishing a custom report use the browse facility to select the file for publishing, otherwise leave the file to publish field as suggested.
3. Select which Report Document you want to publish to (you may have multiple of these if you have created your own custom ones in the file manager).
4. You can rename the default report name and provide a description by typing into the relevant fields.
5. Press Publish to set the process running.
6. Once the publish is complete the form will close.

Screens



Notes

If you frequently create different reports for different audiences you may choose to create new Reports documents with document level permissions to restrict which users can view each document.

Reports Viewer

Overview

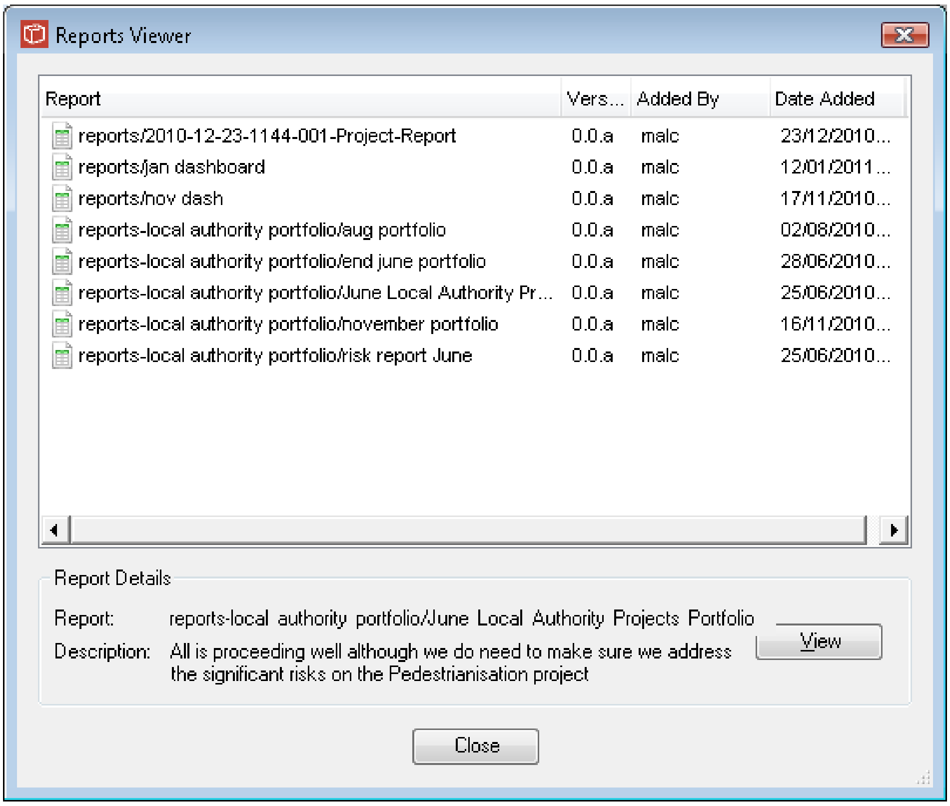
The Reports Viewer form lists any reports available in this project which you have permissions to see (that is in Reports* documents within Specialist products of this project). Rather than being shown in their native .zip format they are listed alongside the name of the person who published them and the publication date.

When viewing reports from here the system unpacks the zip for you and presents you with the final visible report in a web browser making it much more convenient.

Steps

1. Open the Report Viewer form from the main menu->reports menu link.
2. The list can be reordered by clicking on one of the titles.
3. Click a report to select it and the full details will show below including the description
4. Double click or use the view button to open the report to view.

Screens



Notes

This is noted as a view of the file in the user activity monitoring.

Planning Overview

Overview

PIAB loads task information from plans stored in the system (see Using Project Plans earlier) and stores this information in a Planning Database, keeping it updated as plans in the system are changed. By linking together the resource names on the tasks and PIAB user accounts (see Managing Resources) the system can display to each user their tasks or to the PM all the tasks in their project. It can also derive the resource allocations across a number of users by project or Portfolio.

There are three different display options in the interface for task information:
Task List
Gantt chart
Resources chart
This information which can also be included in some reports.

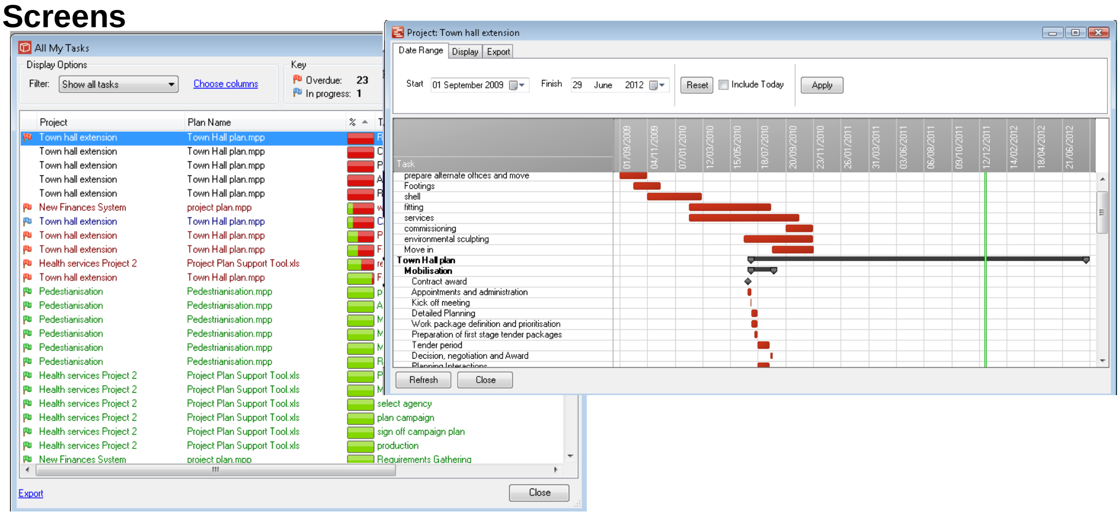
Information can be grouped at Project, Portfolio levels and the 'All my' level which is a filter for just things associated with your user.

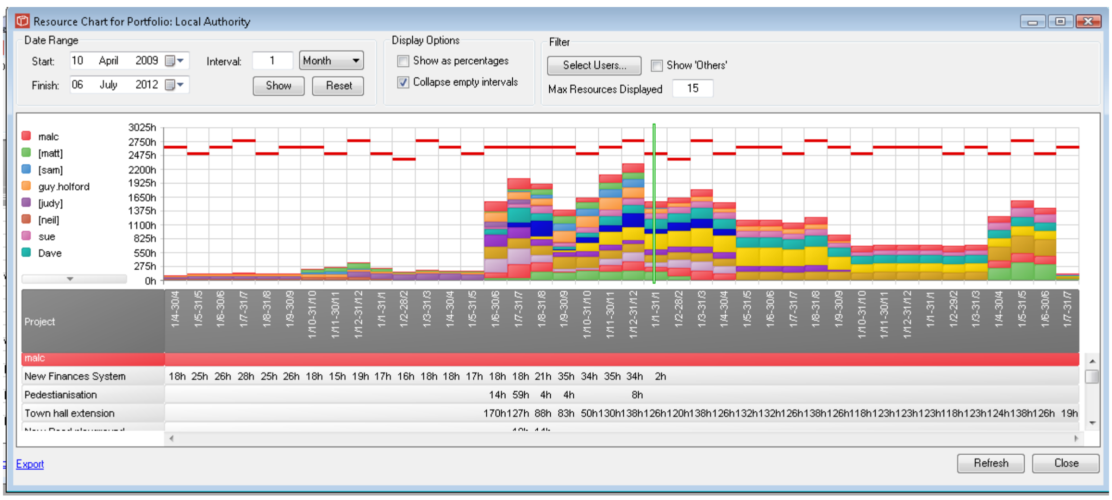
Steps

The user's steps are around using the information packaged and presented and covered on the following factsheets.

The Administrators steps to add project plans, administer these and assign resource names to users are covered in the System Administration Factsheets.

Screens





Notes

All My Tasks

Overview

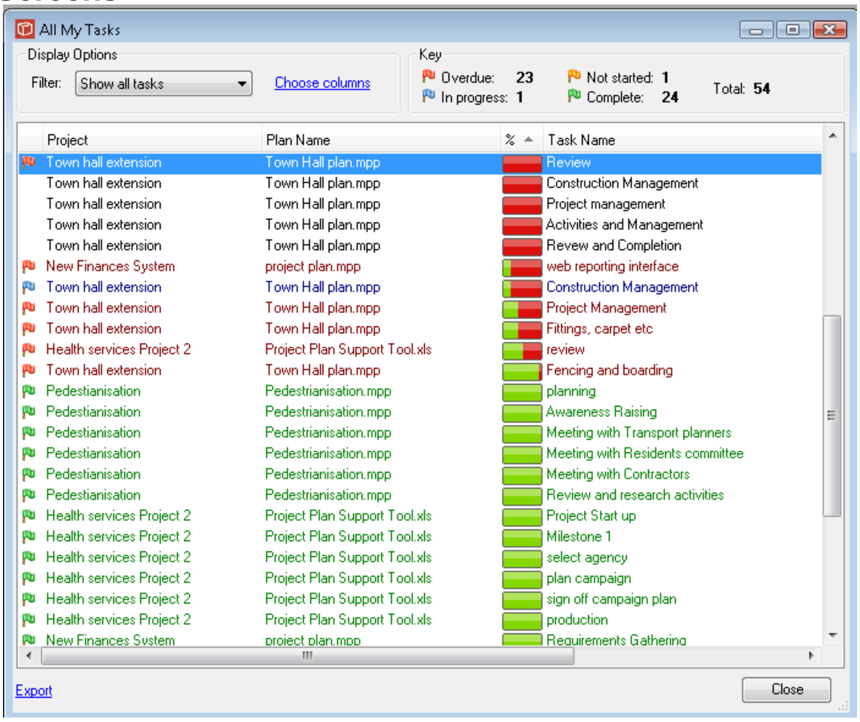
All My tasks is available to every user and will display every task from every project where the user is allocated to a name which appears in a task resource. This should be a complete list of tasks which you have been allocated to work on for every project which still has its plan in the planning database.

Your tasks can be displayed as a list or as a Gantt chart produced from the tasks, take care when using this synthesized Gantt chart as it will not show other important tasks which you are not listed on.

Steps

Plans on the main menu and select My Tasks and then All my tasks (list) or All My Tasks as a Gantt Chart. The options for using these forms are exactly the same as described in the following factsheets on Task List and Gantt Chart.

Screens



Notes

If the project has been archived from the server but your tasks are still showing then ask an administrator to purge the plan from the planning database.

There is a variation on All My Tasks. If you have project Modify permissions or are a Portfolio user you can see All your tasks for the particular Project or Portfolio if you wish.

Task List

Overview

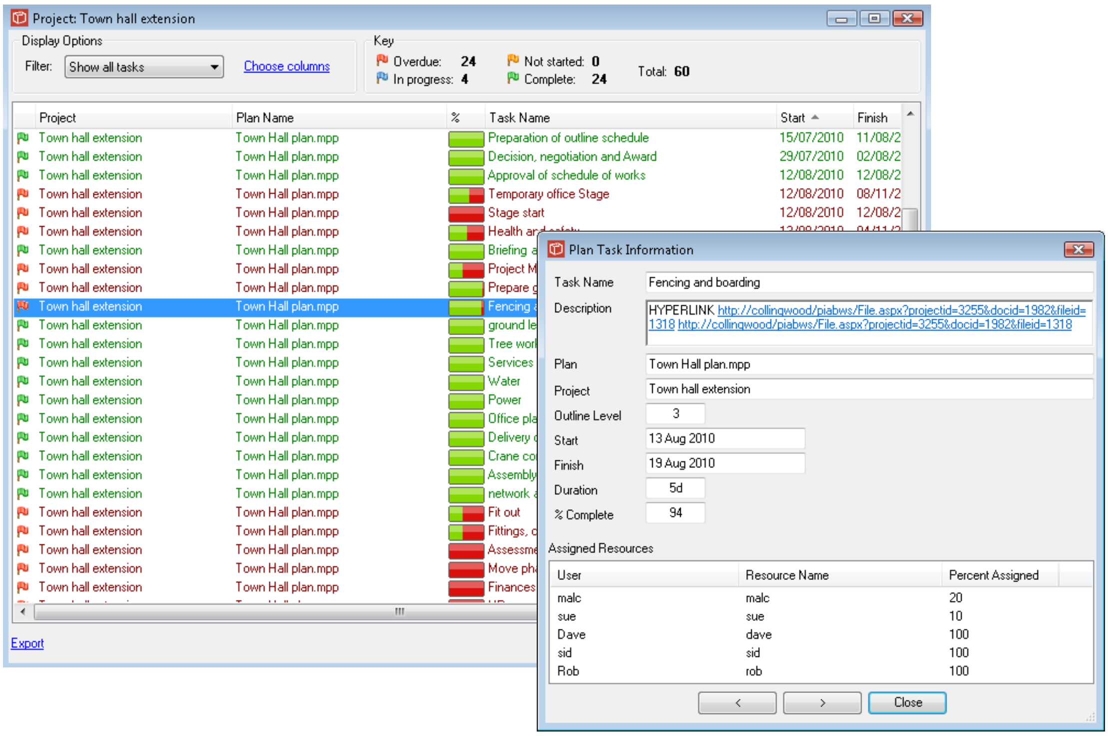
The Task List form is used to show a list of tasks in a collection, that may be all the tasks in a portfolio, all my tasks in the portfolio, all tasks in a project, all my tasks in a project, or simply all my personal tasks. The form and actions are the same in each case so the form title is important.

The form has a number of columns, these can be added and removed using the choose columns link and filter options can also be used to just show incomplete tasks and other options.

Steps

1. Scroll the list to find a task of interest, or click on a heading to order by that data.
2. Each task is a single line summary, to open the full task details double click on that task.
3. Once you have the display as you like it you can Use the export link at the bottom of the form to produce an image, XML export or CSV to oven in excel and work further with the information.
4. The data cannot be changed from this interface, to alter information you must check the source plan out. Edit and check it back in and the data will be reloaded and the display changed here.

Screens



Notes

The tasks are coloured as shown in the key and the total number is also shown.

Gantt Chart

Overview

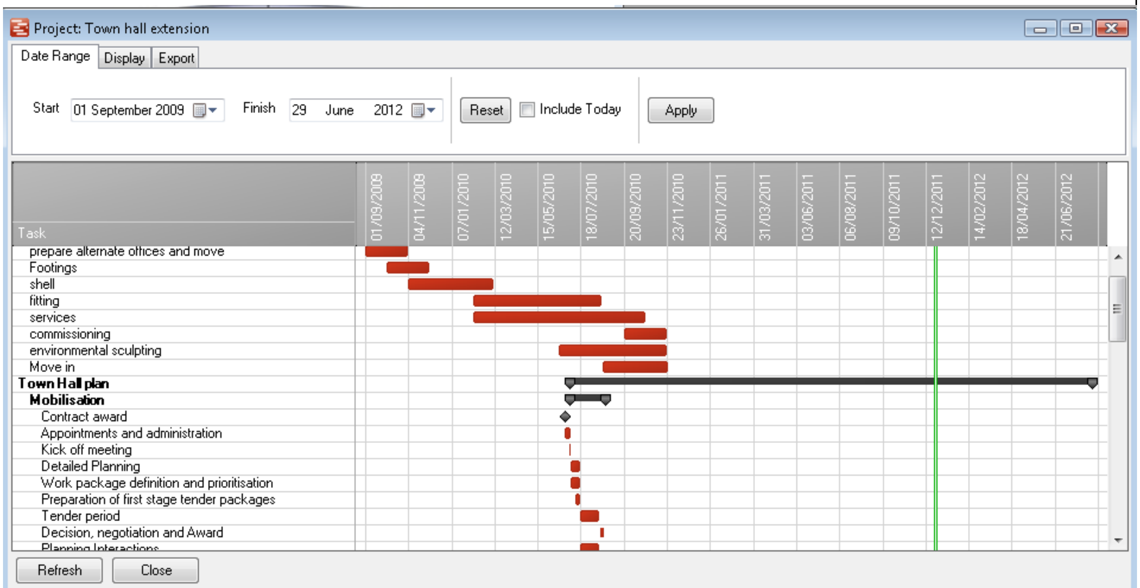
The Task List form is used to show the tasks of a collection in Gantt view, that may be all the tasks in a portfolio, all my tasks in the portfolio, all tasks in a project, all my tasks in a project, or simply all my personal tasks. The form and actions are the same in each case so the form title is important.

The form displays in Gantt view and will start with the tasks in ID order, titles left and duration bars to the right. You can add one of the other attributes to the display i.e. % complete. A green vertical line indicates today's date

Steps

1. Scroll the list to find a task of interest, or click on a heading to order by that data.
2. Each task and bar is a summary, to open the full task details double click on it.
3. Once you have the display as you like it you can Use the export link at the bottom of the form to produce an image, XML export or CSV to oven in excel and work further with the information.
4. The data cannot be changed from this interface, to alter information you must check the source plan out. Edit and check it back in and the data will be reloaded and the display changed here.

Screens



Notes

The date range will automatically show start of project to end of project or today's date (whichever is later), you can alter this or reset using the control at the top of the form.

Other display items include whether the task titles are indented to indicate Outline level\nesting and you can also choose to display only a certain level of outline if you want.

Resource Chart

Overview

The Resource Chart is used to show the tasks of a collection in Resource view, that can be all the tasks in a portfolio or all tasks in a project. The form and actions are the same in each case so the form title is important.

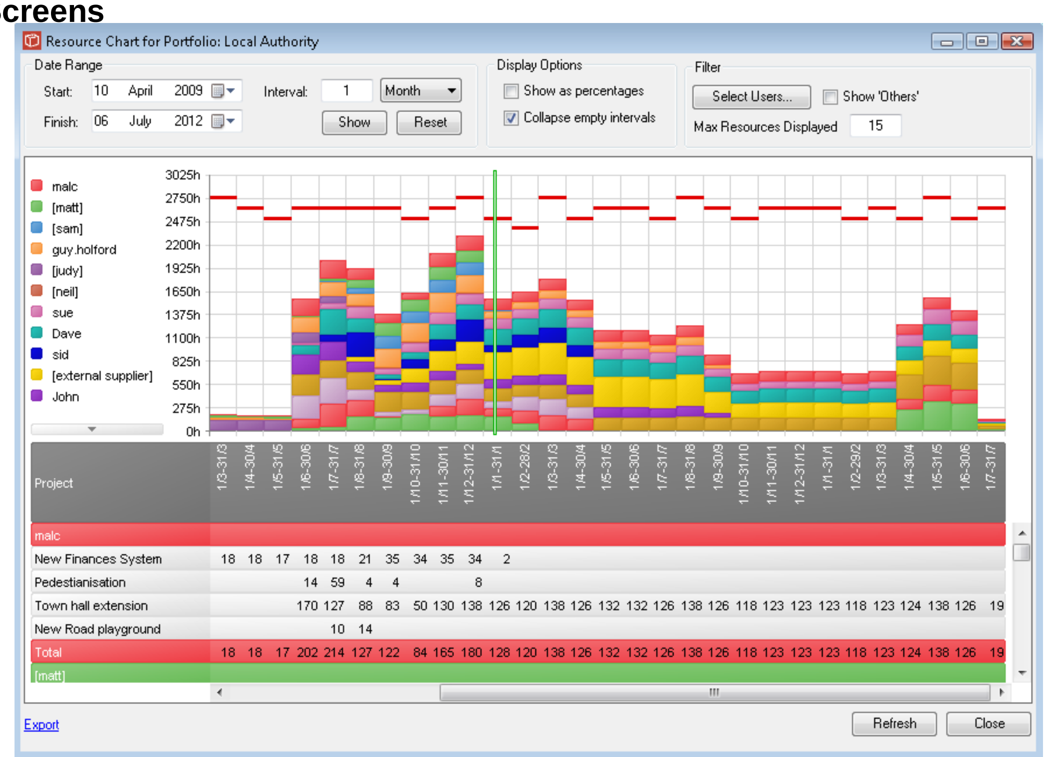
The form Shows a stacked bar format showing each person as a different colour and the amount of time allocated as the height of their bar. A green line indicates today's date and the red line shows the maximum available time calculated based on the period of display and the number of people found to be working on the collection of tasks.

Below the Chart is a table showing the number of hours for each user on each project in each time interval, scroll for the full list.

Steps

1. Scroll the list left or right to see the time period of interest.
2. Point at a block and a hover display will tell you the tasks that make up the block.
3. The Interval defaults to months but can be altered to days, weeks or years for a different examination
4. The display defaults to all resources identified up to the chosen limit (with others as a single block), Use select users to refine the list of users shown.
5. Once you have the display as you like it you can Use the export link at the bottom of the form to produce an image, XML export or CSV to oven in excel and work further with the information.

Screens



Notes

The date range will automatically show start of project to end of project or today's date (whichever is later), you can alter this or reset using the control at the top of the form.

Collapse empty intervals compresses the chart by removing periods where no resource is allocated and displays the date range in bold to indicate where this has occurred.

The user colour key can also be scrolled and any user shown with [square brackets] is displayed in the chart as the name that appears in the source plan file but this has not been allocated to a user in the system.

Task Notifications

Overview

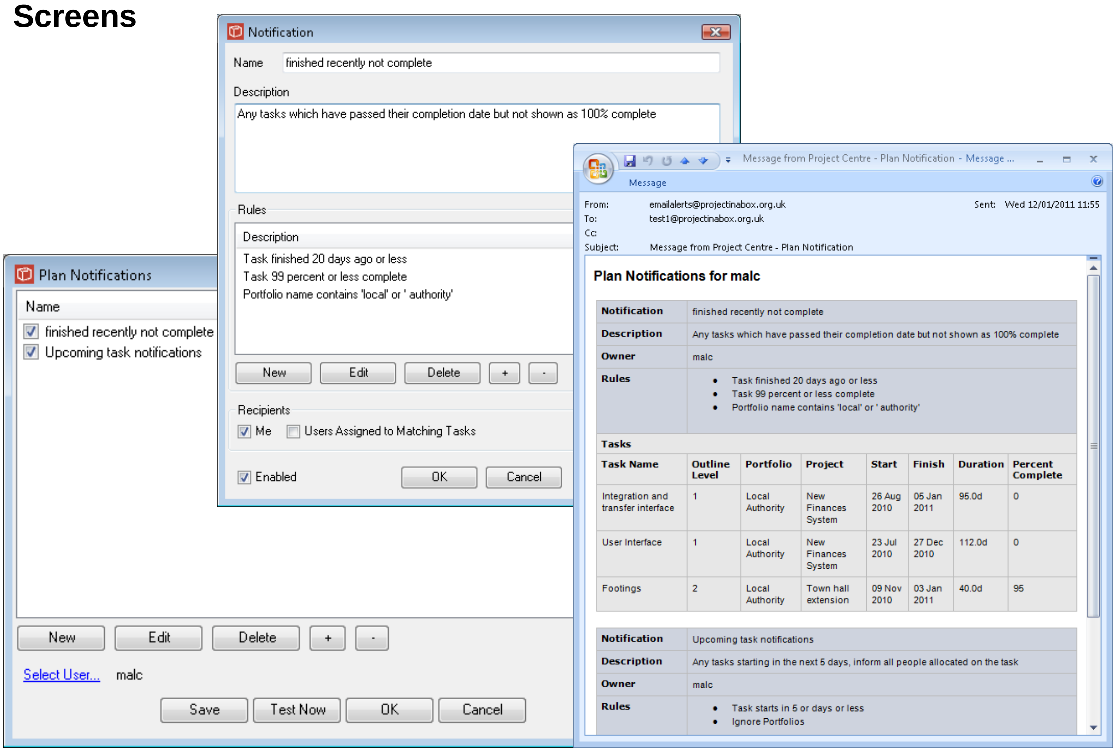
The planning database contains all the current available information about tasks on plans in the system, when they are due to start and finish, their completeness status and who is scheduled to work on them. The Notifications engine enables you to set conditions you are interested in i.e. tasks due to start today, or tasks which are supposed to be finished but not yet recorded as 100% complete. These rules are tested on a set schedule (usually one a night) and when they are met emails are compiled and distributed to the recipients set by the rules.

Each person gets a single email each night telling them about things relevant to them. You can receive notifications from your own rules or ones set by others which include you as a recipient.

Steps

1. Open the Plan notifications form (Main menu->Plan), add a new rule or edit.
2. Each notification is built from a set of individual rules which are treated as ‘and’ in logical terms. There are around 20 logical rules and you then insert the conditions, date, duration text phrase etc until your notification is complete.
3. Determine the recipients, could be you, the people assigned to any matching tasks or specific nominated individuals.
4. Enable the rule and this can then be tested which displays into a browser the results that would be returned if it was run now and sent emails.

Screens



Notes

An administrator can set up or alter other users rules by using the select user option (not present for non admins).

If you don’t have permissions to view a project hen you will not be returned results from that project’s tasks.

If your test successfully produces results but you don’t receive notification emails next morning it is likely that your notification service is not set up correctly, contact your administrator.

The email notification contains links to the task form and the project home page in Enterprise Hub to help keep the recipients in touch with the task they are notified about.

Manage Risks

Overview

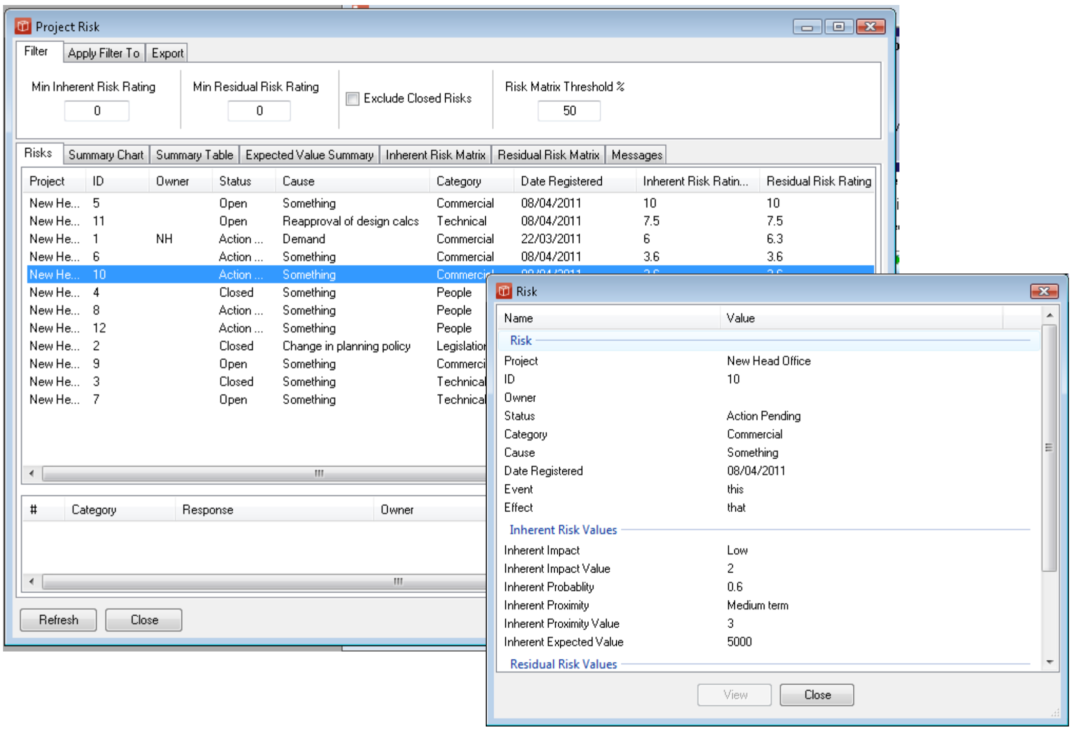
Risks can be recorded in the system in either a spread sheet risk log or a Planner (.spn file) this is usually set up as part of the method template and the contents of the log can then be read to include in reports at a project or Portfolio level using the filters and options in the report wizards.

In addition the risks can be loaded to a form in the application for analysis. This loading can be for the current project or all the projects in the current portfolio.

Steps

1. Select the Project or Portfolio Risks form from Risks Item in the main menu and the data will load accordingly. Any messages about data types or missing files will be shown in the messages tab.
2. Use the data tabs to see the analysis of the risks, in the Risks tab order the data using column headers or click on a risk row to see the detail.
3. A filter can be set and applied to different parts of the risk data and pressing Refresh will then reload the data with the new rules applied.
4. Data cannot be edited here, to make changes check out the source Risk Register update the information and check it back in.

Screens



Notes

Note that when running this for a portfolio the time taken to load the data can be noticeable, this is because it is being read direct from the source files rather than being held in database.

Manage Issues

Overview

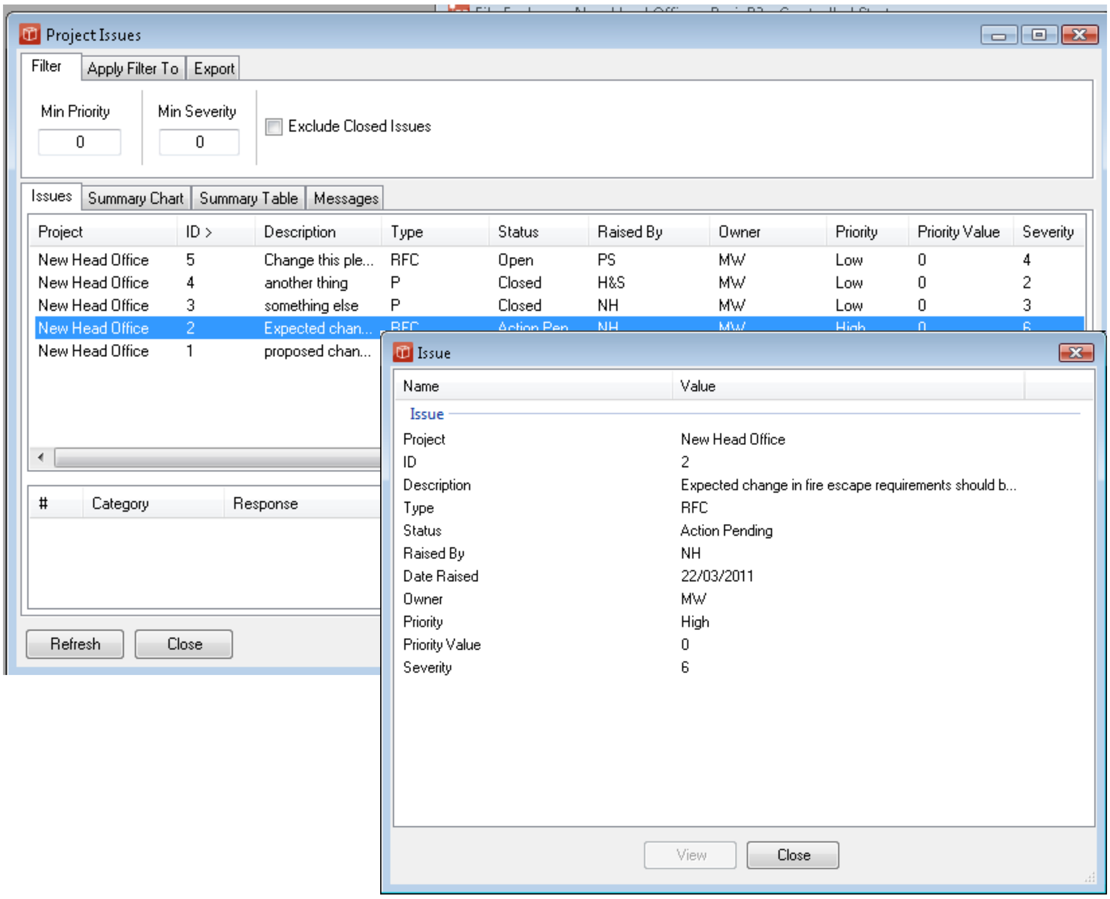
Issues can be recorded in the system in either a spread sheet Issue log or a Planner (.spn file) this is usually set up as part of the method template and the contents of the log can then be read to include in reports at a project or Portfolio level using the filters and options in the report wizards.

In addition the Issues can be loaded to a form in the application for analysis. This loading can be for the current project or all the projects in the current portfolio.

Steps

1. Select the Project or Portfolio Issues form from Issues Item in the main menu and the data will load accordingly. Any messages about data types or missing files will be shown in the messages tab.
2. Use the data tabs to see the analysis of the issues, in the Issues tab order the data using column headers or click on an issue row to see the detail.
3. A filter can be set and applied to different parts of the issue data and pressing Refresh will then reload the data with the new rules applied.
4. Data cannot be updated here. To make changes you should instead check out the source Issue log, edit the content and check it back in.

Screens



Notes

Note that when running this for a portfolio the time taken to load the data can be noticeable, this is because it is being read direct from the source files rather than being held in database.

Enterprise Hub Client Function Factsheets

Logging in to the Enterprise Hub

Overview

Enterprise Hub provides the user with quick and simple access to core PIAB capability. It is browser based and requires no client install. Depending on your hosting and server set up arrangements this may be available on your local network, over the internet or even to a windows operating mobile device like an iPhone, Blackberry or other smart phone.

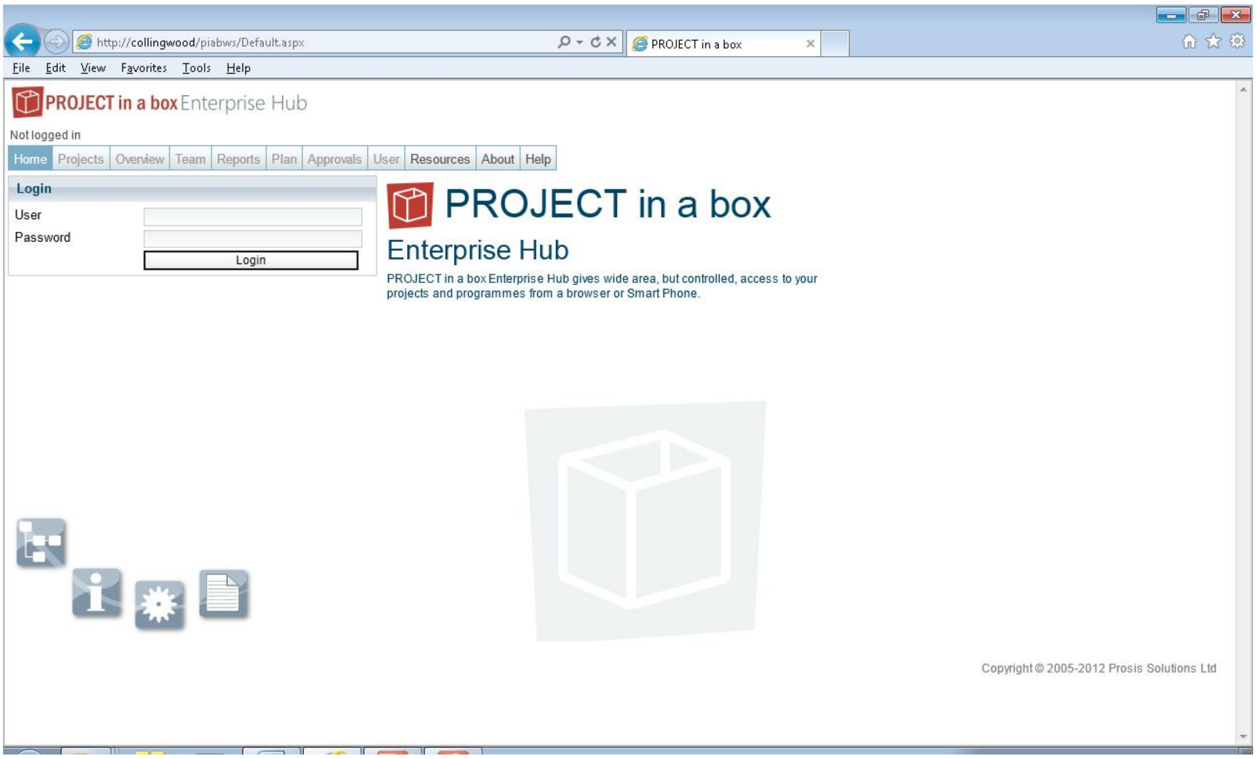
The Enterprise Hub can be graphically completely rebranded so the images shown in this section may differ from those on your version.

Enterprise Hub is reached using the following URL `http://[servername]/piabws/Default.aspx` or if being used with encryption on via https instead.

Steps

1. Click on a shortcut or type in the address you have been given for the Enterprise Hub.
2. Depending on your server security and Enterprise Hub settings there are a number of different approaches to logging on:
   a. Type in your username and password then press login
   b. If Integrated windows access is being used then the username and password will be populated from the windows account you are currently using.
   c. If activated you may log in as Guest where no username or password are required and you can see projects published to the entire organisation.

Screens



Notes

The Enterprise Hub is capable of being highly styled to match a customer brand identity so the colours and logos may differ from those shown here. Also the customer can alter the content displayed in the RSS feed areas as explained in the Enterprise Hub Administration section.

Selecting a Portfolio and Project

Overview

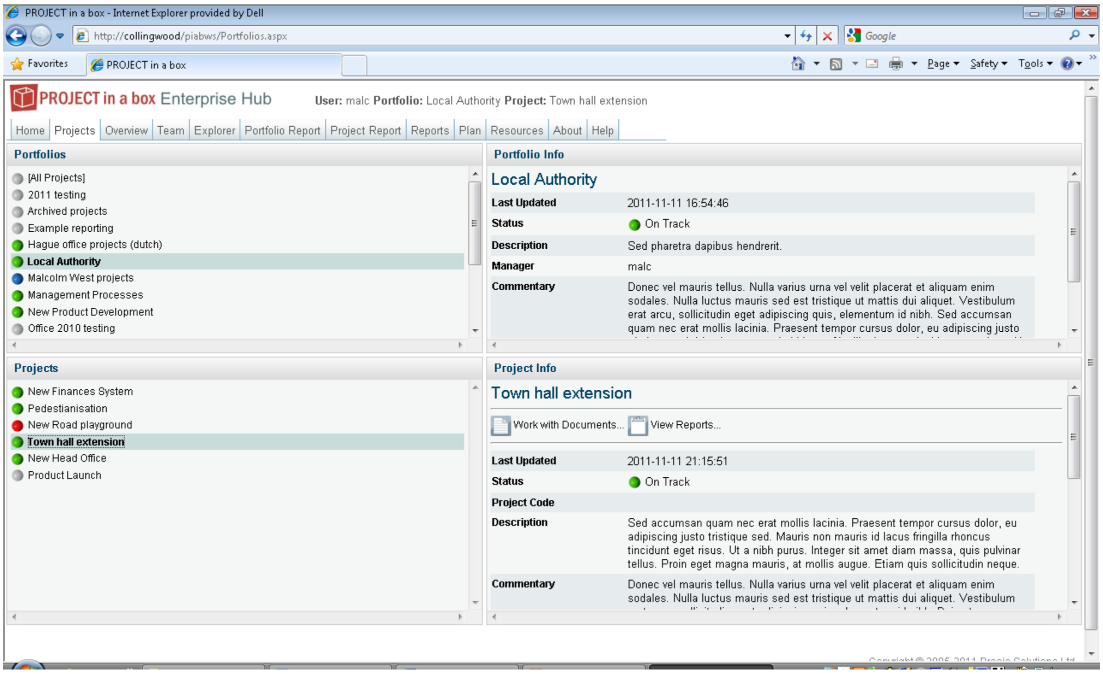
Once you have logged in, select the projects tab and the Enterprise Hub presents you with a list of Portfolios you have permissions to view, if none you will just have a portfolio titled 'all projects'. Click to select a Portfolio and then its summary information will show below and its list of projects (which you have permissions to view) will appear to the right.

Again click on a project of interest to see its project summary information and the two main activity choices of work with documents or view reports.

Steps

1. First pick a Portfolio in the left list (or [allprojects]).
2. Then pick a project from the list in the right hand side.
3. Information about that project and options are available below or use the main tabs across the top to select the next action.

Screens



Notes

You can return to this Projects tab at any time to change the focus of portfolio and project.

Viewing Project Files (Overview)

Overview

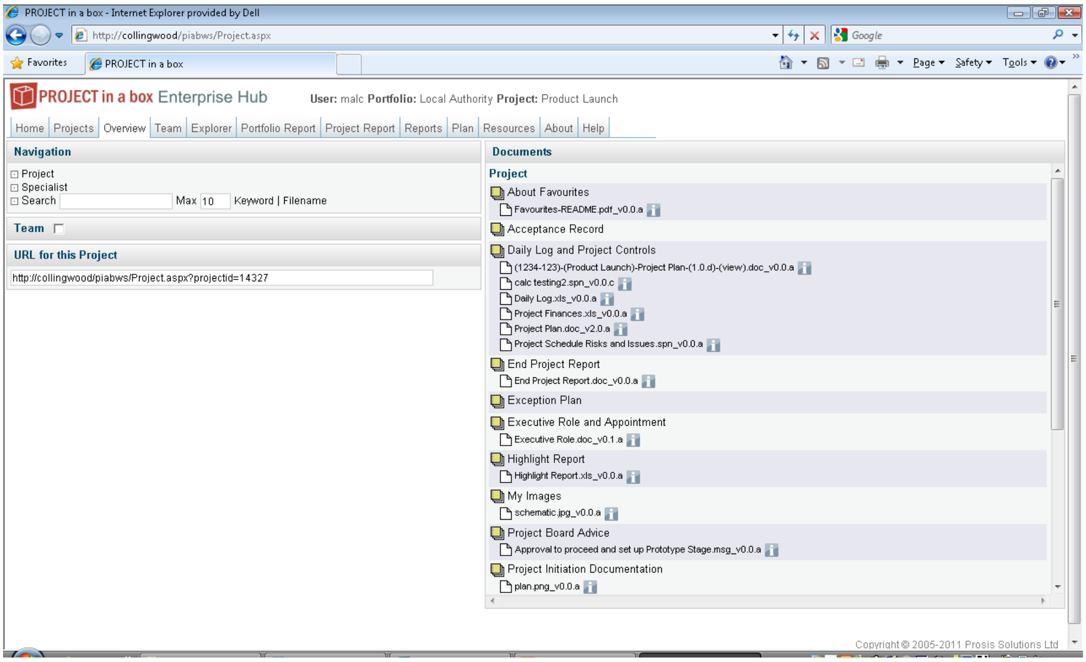
At the core of Enterprise Hub's Communication/outreach capability is the ability to provide any permitted user with the ability to view the latest/current version of a project file. Project files are grouped into Documents and provided in an alphabetic list showing the name and the current version number of the file.

The alphabetic presentation of the permitted current project documents makes it much more accessible for occasional project team members or stakeholders from the wider organisation who may not be familiar with the project management methodology being used by the core team. This Overview access is available to all users with a licence for PROJECT in a box, manager, Team or Enterprise Hub. **It is the only Document view available to View Only licence users.**

Steps

1. Use the Document Index area on the left of the page to select which part of the project you want to view data for (overall project, one of the stages or the specialist products)
2. The list on the right then displays the documents and files as permitted for the user (some documents may have been flagged as no-access in the permissions model so they will not be displayed here).
3. To view the file simply click on the file name link, the file will be downloaded to the temp area on your PC and opened with the appropriate application for the file type
4. When you have finished viewing the file just close it as any changes you make will not be saved.
5. To view the version history of a file click on the info link next to the filename and this will pop up in a separate window.

Screens



Notes

Users can also use the Search facility here to find uses of particular keywords in their project documents. Via the Search View only users can get access to older versions of project files they have permission to view (the normal overview list only allows them to view the current version).

Also the URL field allows for quick access to this project, using it to create a shortcut or add a webpart in SharePoint (please note other users wishing to visit this will need appropriate permissions to gain access).

Working with Project Files (Explorer)

Overview

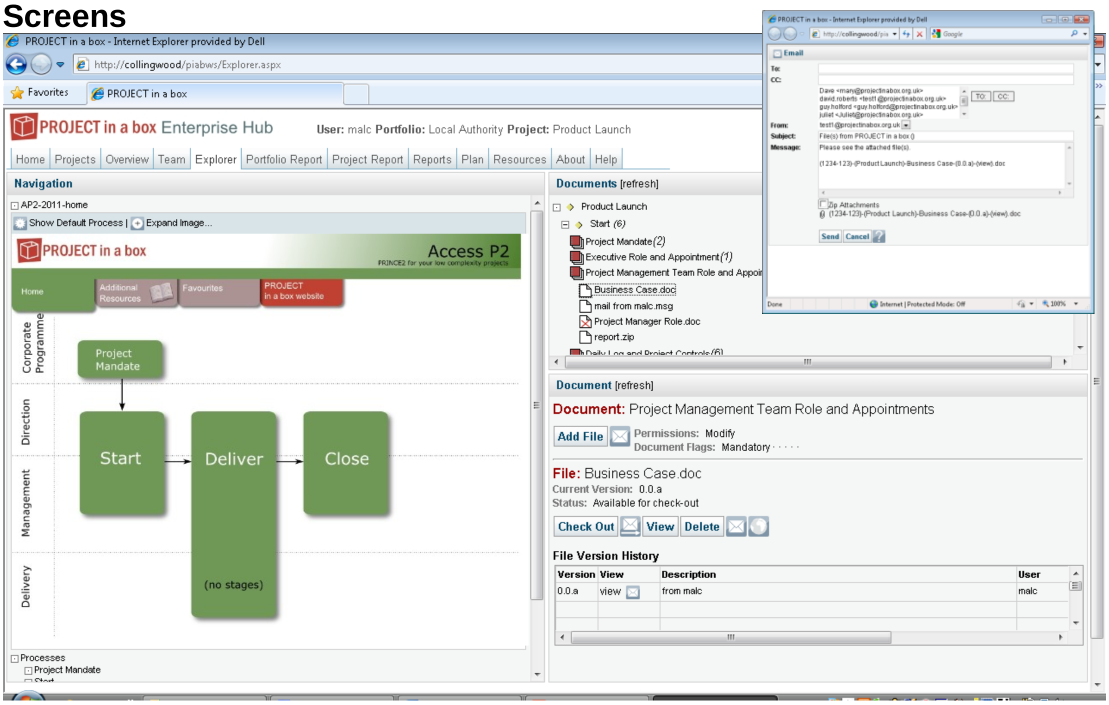
PROJECT in a box users with a Manager or Team licence (i.e. those users who could have access through the .NET software tool if they wished) can access the project documentation to the same level using the Explorer forms instead. This access allows for checking out and in, adding new content etc and supports email integration and navigation by Index, process or search to give a tool set equivalent to the document management available in the .NET software client for the typical team member.

This would be the main interaction with PROJECT in a box for Mac or Linux users who couldn't use the .NET software client. It is very common for organisations to expose the Enterprise Hub through their firewalls to enable their partners, customers, suppliers etc to interact with projects through this interface rather than the software client as it can be fully branded to present a unified corporate front.

Steps

1. Use the navigation pane to find the process you want to work on and then in the documents pane select your document of interest from the process. Alternatively use index or search to select a particular document directly.
2. In the document pane click on the Document to activate it in the right hand pane and view its files (number present indicated by the figure in brackets).
3. Click to select a particular file and this will be populated into the lower form. You then have the same file management capabilities as in the software client with view, check out and in, new file addition, email interaction and delete depending on your permissions level on that particular document.

Screens



Notes

All email sends from Enterprise Hub are managed through the SMTP accounts held in the PIAB server and copies of messages will be sent to your home email account for storage.

Please note that when using the Explorer to checkout or in files the Enterprise Hub cannot interact directly with your Checkout and in folders so you will need to be careful about where you choose to place files and remembering where to pick them up from. It is possible to check out in EH and back in with the Software client and vice versa if required.

Administration of documents, addition or deletion, change or order, permissions alteration etc can only be undertaken via the .NET software client.

Plan

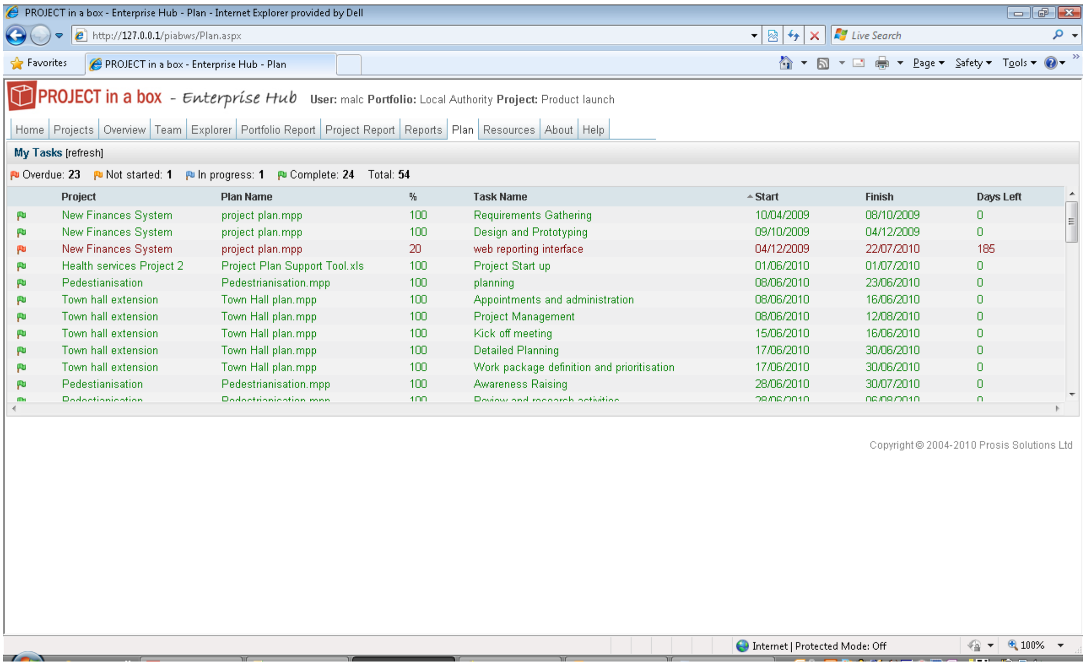
Overview

The plan tab provides you with a list of all the tasks which are currently allocated to you on plans held in the planning database.

Each row is a summary task and you can scroll through the tasks as the list can be quite long. The tasks are colour coded to help you pick out important items and you can also sort the list by clicking on the headers in each column.

Steps

Screens



Notes

This display of All tasks is provided as an overview and users cannot click on a row to open the full detail on the task, for that improved functionality and more information relating to tasks, plans and resources we recommend you use the forms in the software client instead.

Click on the task name to see the full details of the task or on the project name to go to the project home page.

Communications (Team)

Overview

Enterprise hub lets you keep in contact with your project team colleagues by providing a list of all users who have permissions to work on this project.

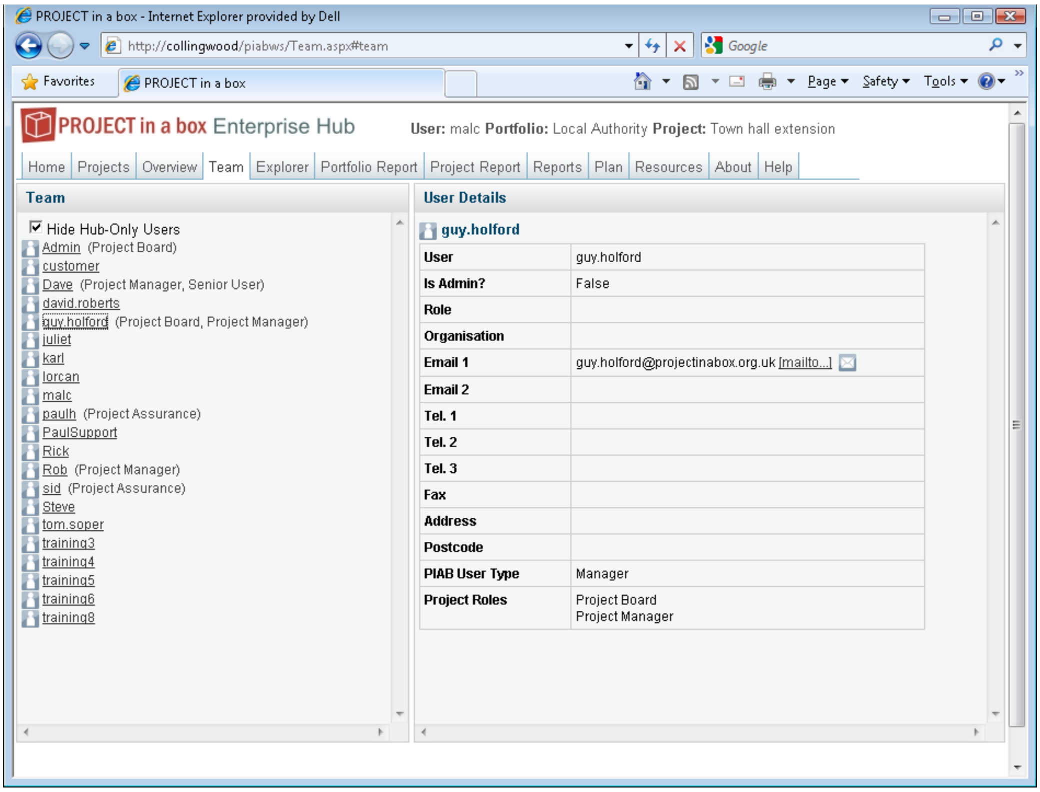
The list can be filtered using the tick box to only show users with a Manager or Team licence (assumed to be core team members) or all users even those with View only Enterprise Hub licences.

This page is available to all PROJECT in a box users and is particularly helpful for EH licence users who can use it to contact core team members to ask for project documents they want to edit or to request a permissions or licence change.

Steps

1. Tick the Team pane to activate it.
2. Click on the user name to and their contact details will populate into the right hand pane.

Screens



Notes

Viewing Reports

Overview

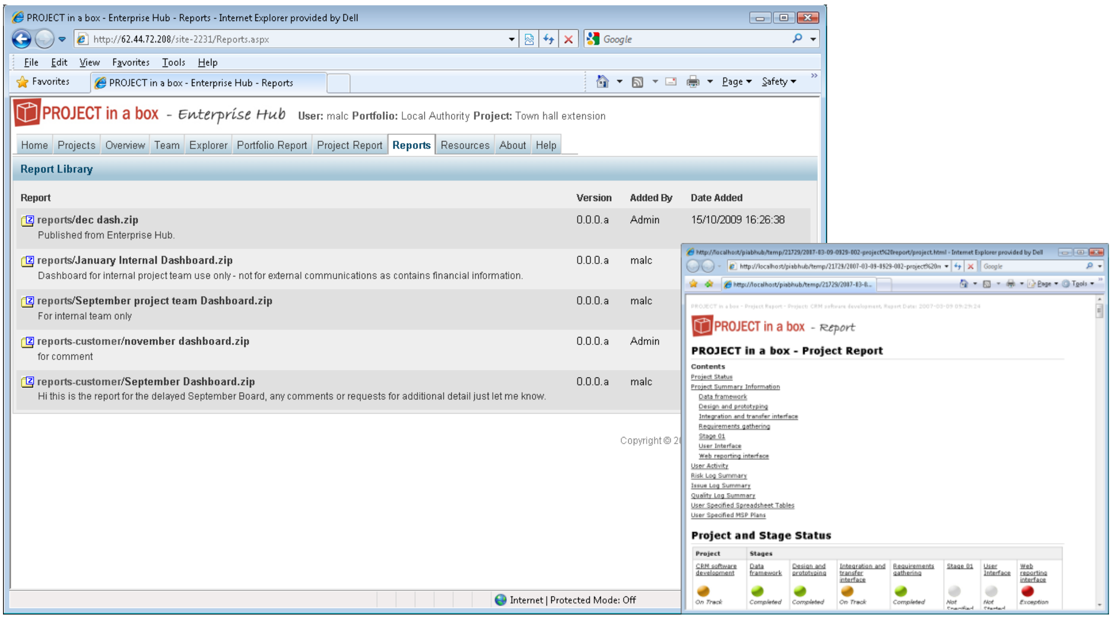
Whilst most users cannot request a live report to be produced via the Enterprise Hub they can view existing reports which have been published by PROJECT in a box Manager users.

This resource in the EH is available to all PROJECT in a box users (Manager, Team or EH licence holders) and simply repeats the content of the Reports documents in Specialist products but in an easier to access format.

Steps

1. Tick the Reports pane to activate it.
2. Click on the report name you wish to see and this will launch in a new window as shown below.
3. Name of publisher and data of publication are shown along with the comments provided by the publisher.

Screens



Notes

See 'Report Publishing' for more detail on how to get reports into this area. In particular note that it is possible to have multiple Reports documents each will different permissions so that only particular users can see particular reports.

This is a report viewing area, if you wish to download or email a copy of the report out directly to a colleague then please use the Explorer form to do this.

Viewing a report through this interface is picked up in your recent activity trail and this enables the PM to track whether team/board members have viewed the reports they are supposed to have.

When using the recommended reporting pattern with a notification set on the reports document which sends an email to report recipients, clicking on the link in the email will bring the user directly to this reports library.

My Approvals

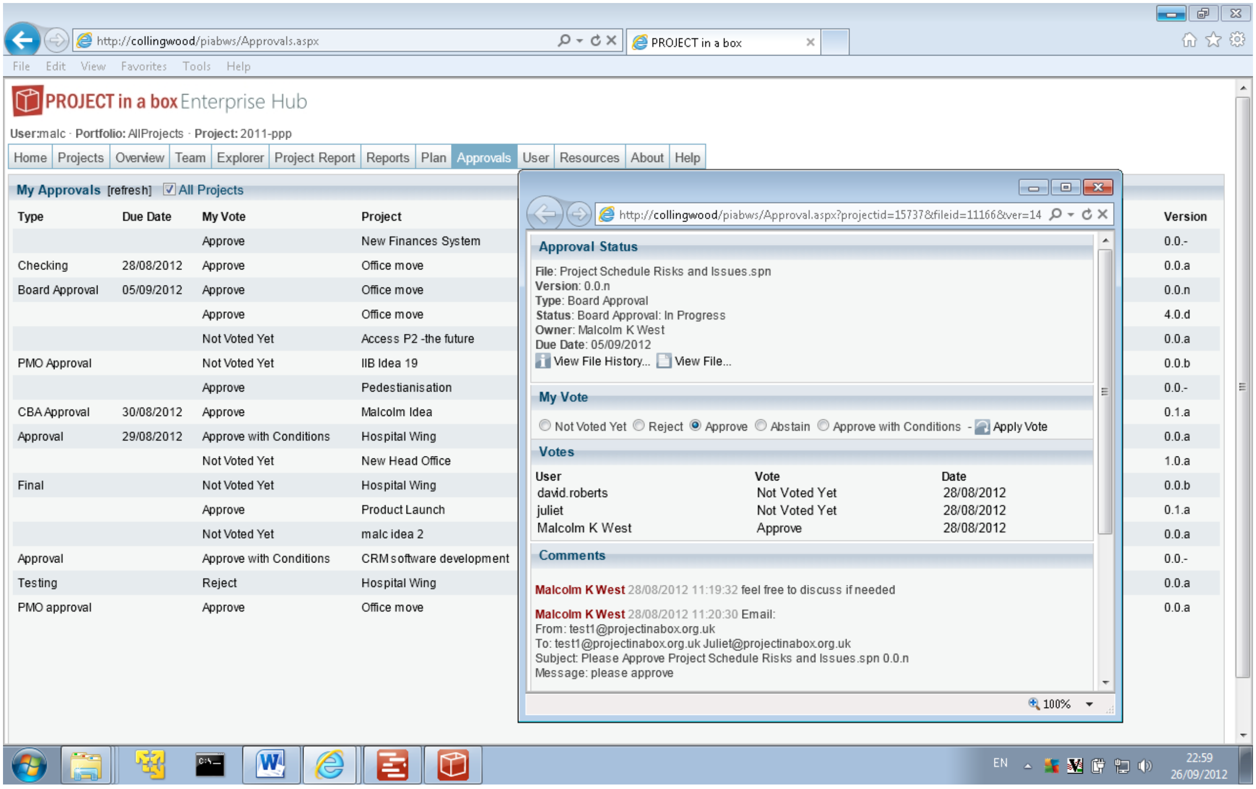
Overview

When you receive an invitation to be involved in a file approval process the link included will bring you to the My approvals for in the Enterprise Hub with the particular approval highlighted. The list can be ordered and items clicked on to paunch a pop out Approval window which contains all the same approval capability as in the software client

Steps

1. Click to select the approval of interest, read the comments and add to them if you wish.
2. View other users votes then make your own vote.

Screens



Notes

Inputting to an approval is exactly the same process from software client or browser client. When inputting from the browser client though approvals can be made following just a view rather than requiring a checkout/in as is the case with self approved. This means users with devices not supporting file management systems like iPads and iPhones can still make approvals.

Creating Project Reports

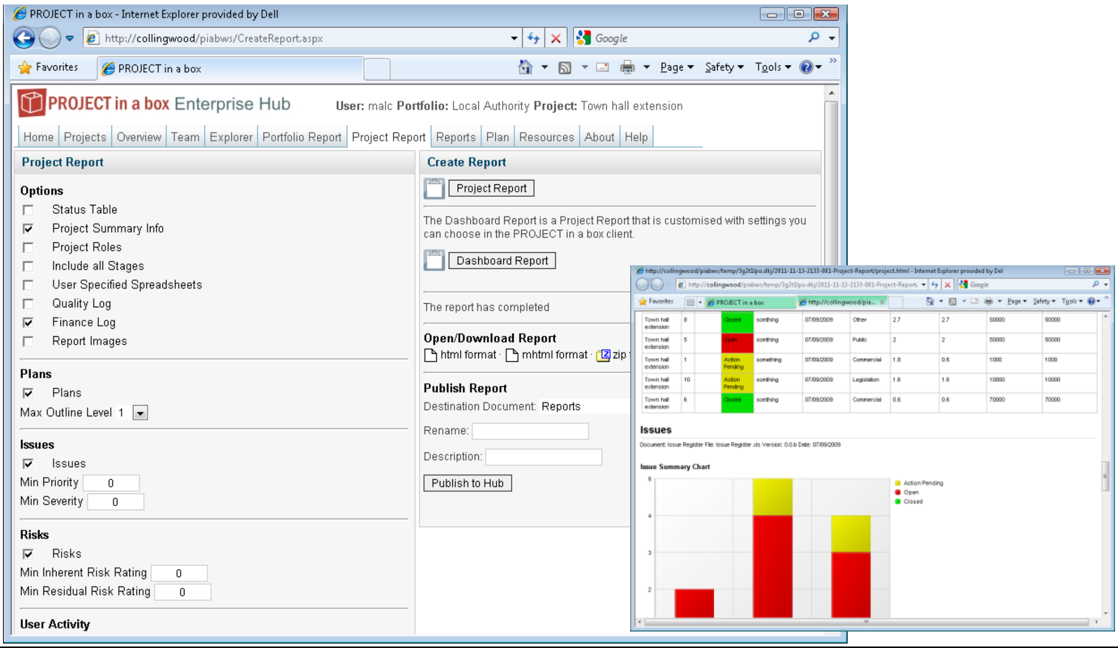
Overview

Users with a Manager licence and a Modify permission on the current project are provided with a project report production capacity within the EH enabling them to produce a current dashboard or project report. This can then be viewed, downloaded, printed or published to the report viewing area to be shared with other team members.

Steps

1. Click the Project Report pane to activate it.
2. To produce a:
   a. Dashboard report simply click the appropriate create report button and it will use either your saved Dashboard preferences from the client or a pre defined selection (stored in the EH config file),
   b. Project report use the tick list to include the content you require and then press the create report button.
3. Once produced the report will be available for immediate viewing in a number of formats shown on the right hand side along with a set of options for download or publish.
4. Using the Publish option here enables the report to be saved to any of the report folders within the current project.

Screens



Notes

When creating reports here the branding applied and report templates used will be the master set held on the server so if you are more familiar with reports produced on your PC with customised graphics or report templates please review carefully before publishing them.

Creating Portfolio Reports

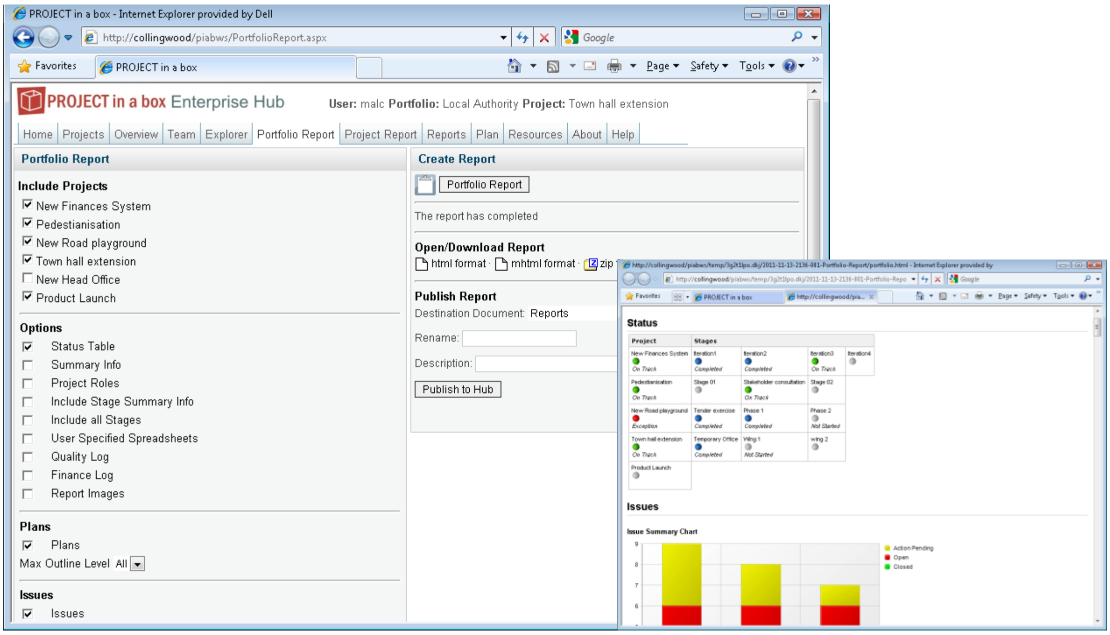
Overview

Users with a Manager licence, a Modify permission on the current project and a selected Portfolio are provided with a project report production capacity within the EH enabling them to produce a portfolio report. This can then be viewed, downloaded, printed or published to the report viewing area to be shared with other team members.

Steps

1. Tick the Project Report pane to activate it.
2. To produce a Portfolio Report use the tick list to select the projects you want and to include the content you require and then press the create report button.
3. Once produced the report will be available for immediate viewing in a number of formats shown on the right hand side along with a set of options for download or publish.
4. Using the Publish option here enables the report to be saved to any of the report folders within the current project.

Screens



Notes

When creating reports here the branding applied and report templates used will be the master set held on the server so if you are more familiar with reports produced on your PC with customised graphics or report templates please review carefully before publishing them.

When publishing Portfolio reports it is often helpful to have a Reports-Portfolio Document shared between the various projects in the portfolio so that a publish into it from any of the projects in the portfolio is available more widely.

Resources and User

Overview

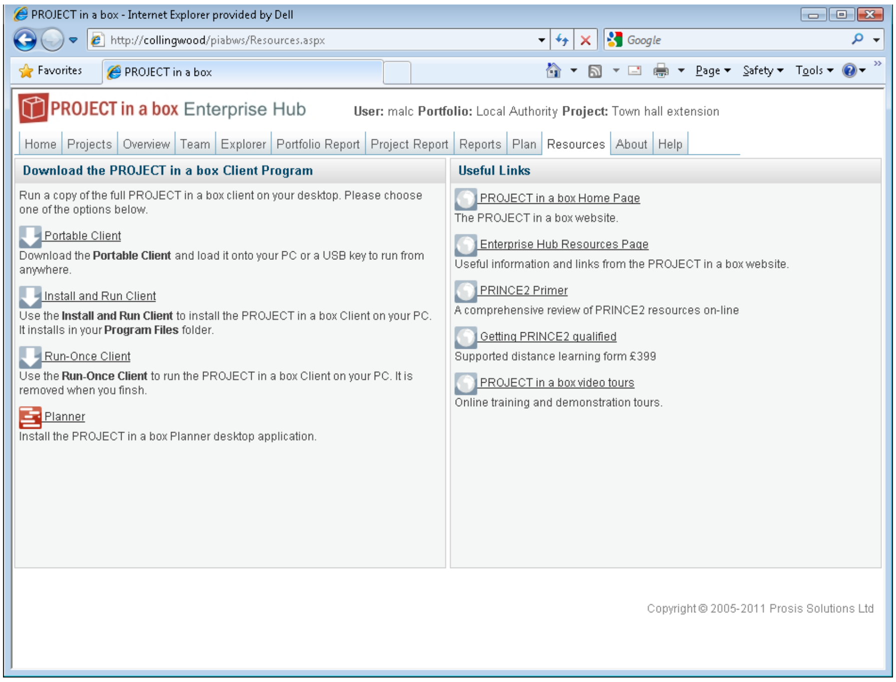
For many PROJECT in a box users Enterprise Hub is their entry to the system, giving them an entry level capability which is accessible immediately. For the users that want to do more they will need to progress on to the .NET software client and the Resources tab is provided as a place to do this.

A range of other useful links are available from this page which can be personalised for an implementation by altering the html code used in that frame.

Steps

1. Click on the Resources pane to activate it.
2. The left hand side usually provides three different installers for the .NET software client but may be altered in different implementations to either provide different Windows environment support (as shown below here or with some of the deployment clients removed:
   a. Portable Client – download and set up on a USB key to run it from anywhere.
   b. Install and Run Client – download to install your client into Program Files which will require you to have local admin rights.
   c. Run Once Client – use this to download and run the client from your temp folder, this can be done without local admin rights but needs to be done each time you want to use the client.
3. A separate Planner installer is also provided although it should be noted that Planner is also included as standard with the other installers as well.

Screens



Notes

The standard install will not automatically create these deployment client installs. If you click on the link and get a message file unavailable contact your administrator and ask them to look at the deployment clients section on the admin support.

Many customers choose to alter these deployment client options so your screen may look different.

The User form allows each user to change their password if they want and to set up their contact details.

.NET Client Administration Factsheets

Client Install Options - General

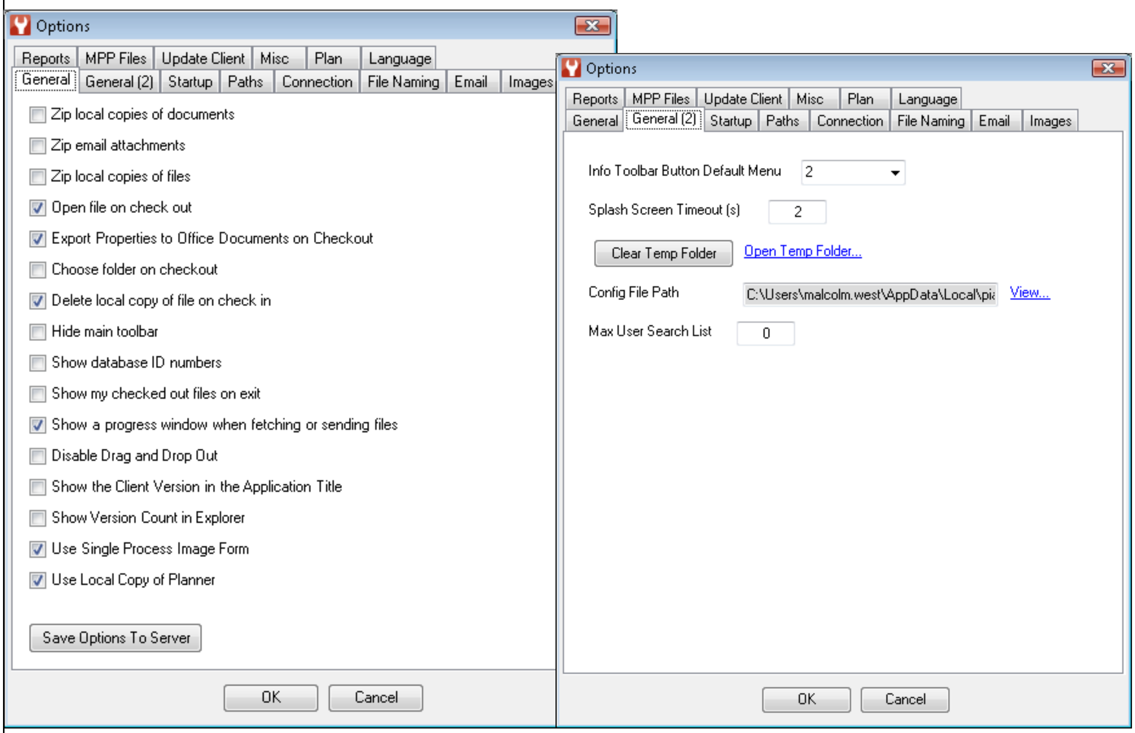
Overview

Users can set their own personal preferences for their local install of the client interface and choose to then upload these to the server to support their working on the Enterprise Hub.

Steps

1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The general Tab allows users to:
    a. Zip Email Attachments – all check out and view files to email will be zipped
    b. Use Title field in MS Office documents – insert file name into the file title field and this will autoupdate it, to help with version control management
    c. Open file on checkout – when a file is checked out automatically open it, this can be toggled off also from the Document pane
    d. Choose folder on checkout – don't use the default checkout folder, instead provide a save as form, also can be toggled from the Document pane
    e. Delete local copy on check in – this deletes the local copy from your check in folder when you check the file back in to ensure your Checkout/in folder behaves as a list of files you are currently working on. Also removes for your own undos.
    f. Hide Main toolbar – hides the Quick Click menu
    g. Show Database ID numbers – show the unique system ID for the file in the document tree
    h. Show the 'my details' list of checked out files when you log out
    i. Provide a transparent progress window for info on progress with doc transfers
    j. Disable drag and drop – makes for quicker click to open view in tree

Screens



Notes

You can also view and clear your temp folder from here.

You can also check the location of and view your local configuration file which holds all the settings on the Options form plus some others.

Client Install Options – Startup

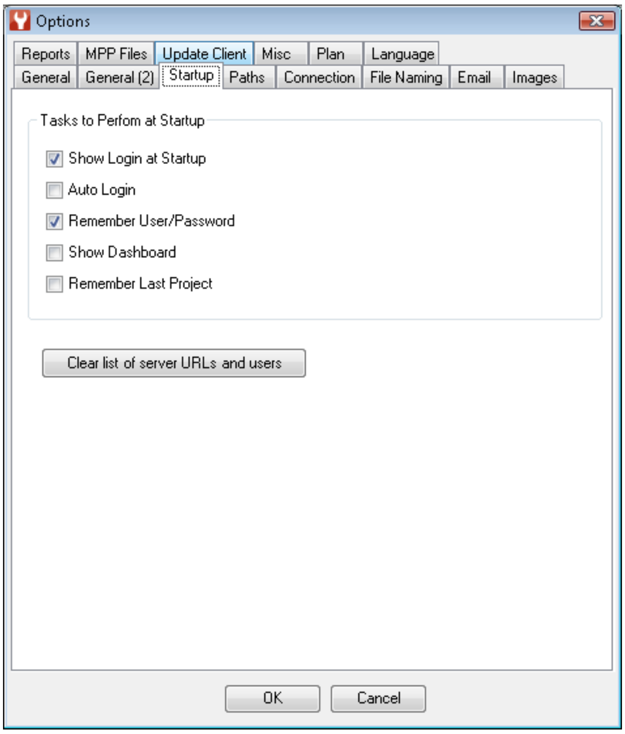
Overview

Users can set their own personal preferences for their local install of the client interface.

Steps

1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The Startup Tab allows users to:
    a. Show Login at startup – Determines whether the login form is shown when the system is started.
    b. Auto Login – With all the top three options selected the system will auto log the user in (for quick access when running with AD single sign on).
    c. Remember User/Password – the Client will remember the username and password for the last logged on user (password stored encrypted).
    d. Remember last project – Doesn't offer the Select Project form but goes directly to last used project.
    e. Show Dashboard – Automatically launches the dashboard for each project you visit.
    f. Show Summary Info Window – shows the Project and Portfolio summary info window

Screens



Notes

Care should be taken when using the Remember user/password option as this is a potential security loophole. If you adopt the remember user name/password options then these are stored encrypted on your local computer and another user gaining access to your computer could then use these to impersonate you. If using Active Directory Single Sign On then the effect of these options may differ slightly.

You can also use the Clear list of server URLs and user's button to clear these from your local configuration file.

Client Install Options - Paths

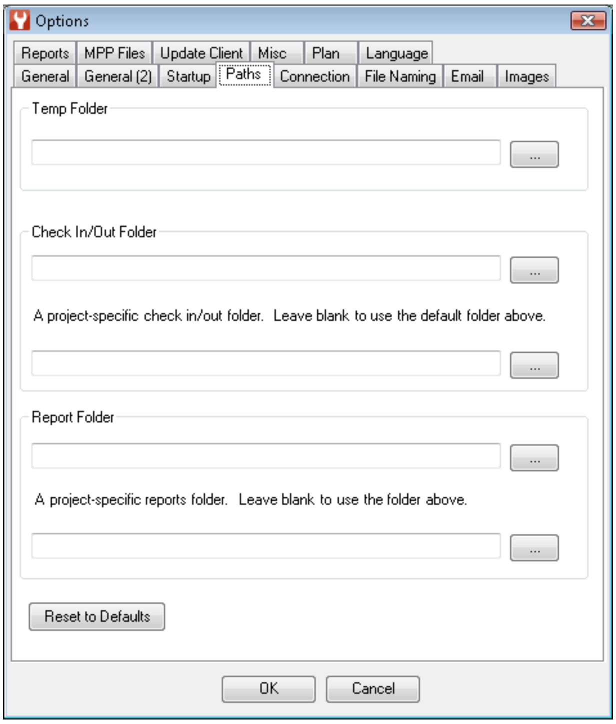
Overview

Users can set their own personal preferences for their local install of the client interface.

Steps

1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The Paths Tab allows users to:
   a. Temp Folder – define the location for files brought to the client for view purposes also to cache navigation diagram images.
   b. Check in/out Folder – define the location for files brought to the client for check out purposes which are then the responsibility of the user.
   c. Report Folder – define the location to be used for storing created reports

Screens



Notes

We recommend that unless you have particular reason for altering these you leave them in default mode as this will make it easier for you to get support if required. The default configuration has also been optimised to keep views separated from checkouts and report folders with checkouts.

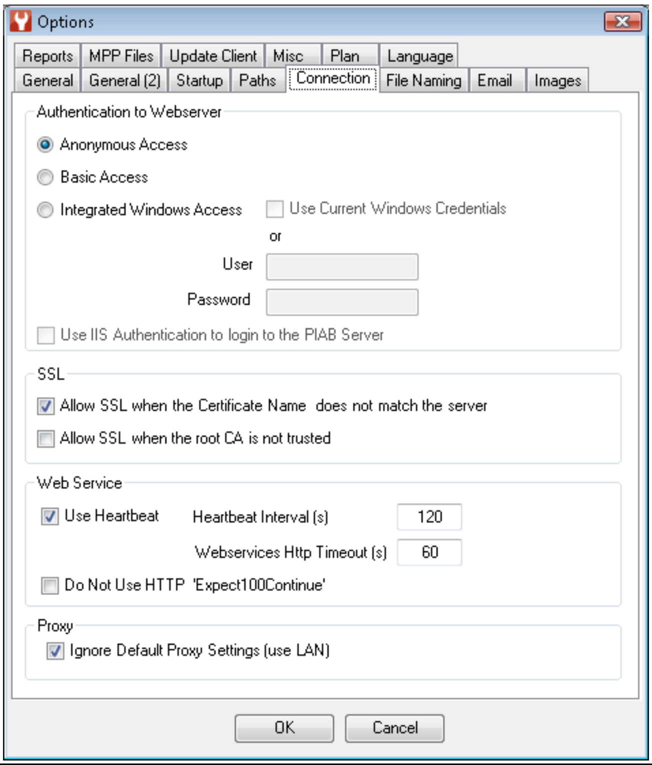
For Check in/out and Reports folders you can set either or both default paths (which apply to all projects without a project-specific path set) or Project specific paths. When trying to set a Project-specific path it will be created for the project you are currently logged into.

Client Install Options – Connection

Overview
Users can set their own personal preferences for their local install of the client interface.

Steps
1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The Connection Tab allows users to:
   a. Web Service – set the time period (seconds) the webservices should wait before timing out, when used over slow or heavily loaded connections, or with large documents or report production this should be set longer.
   b. SSL – Address and ignore the common warning screens presented when using SSL and the certificates are not accurate.
   c. Heartbeat – The heart beat is recommended as the system will warn you and close if it loses contact with the server, you can set the period at which you want it to test the connection.
   d. Authentication to Webserver – A number of authentication modes are supported to suit different organisations network and security practices. The default mode is Anonymous and should be used unless your System administrator advises otherwise.
   e. Proxy – by default these are picked up from your IE settings and may be overridden using this tick box.

Screens



Notes

Client Install Options – File Names and Email

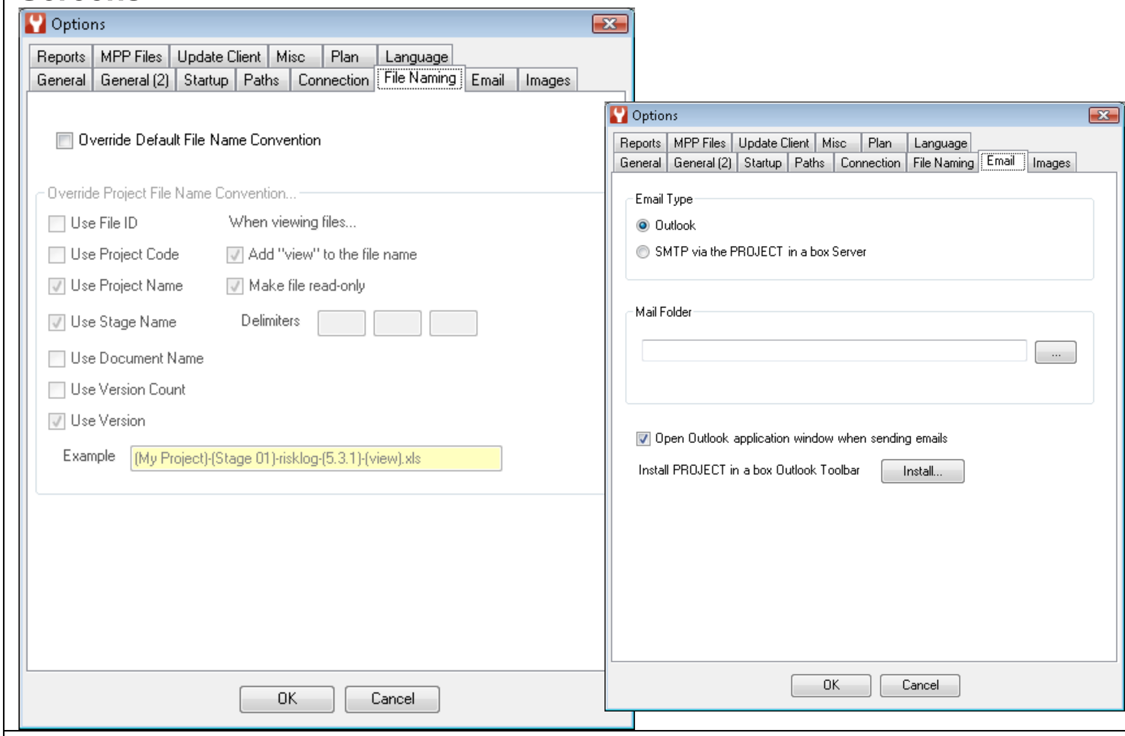
Overview

Users can set their own personal preferences for their local install of the client interface.

Steps

1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The Filenames Tab allows users to set the naming convention used by the client with files it receives from the server. Usually this will be greyed inaccessible as shown here unless the current project has allowed users to set their own naming convention.
3. To change the naming convention, select or unselect the tick boxes, an example is provided so you can see the expected format.

Screens



Notes

This is the format that the client will give you and expect files to be returned in, be careful when changing this form when you have files already checked out as you will need to edit the name to meet your new format before checking them back in. Note the difference between Version Count (a straight escalating numerical counter) e.g. 65 or the Version which uses the formatting rules set and may look like 2.3.d or similar.

Lastly the Email tab allows you to choose the email method you prefer Outlook or SMTP and also set the location where the 'Check in from Email' form and an individual file check in form goes to look for emails provided back to the system by the Outlook toolbar.

The Install Outlook toolbar allows users to add the Outlook toolbar to a local Outlook instance, note Outlook must be closed first for this to be effective.

Client Install Options – Images, Reports and MPP

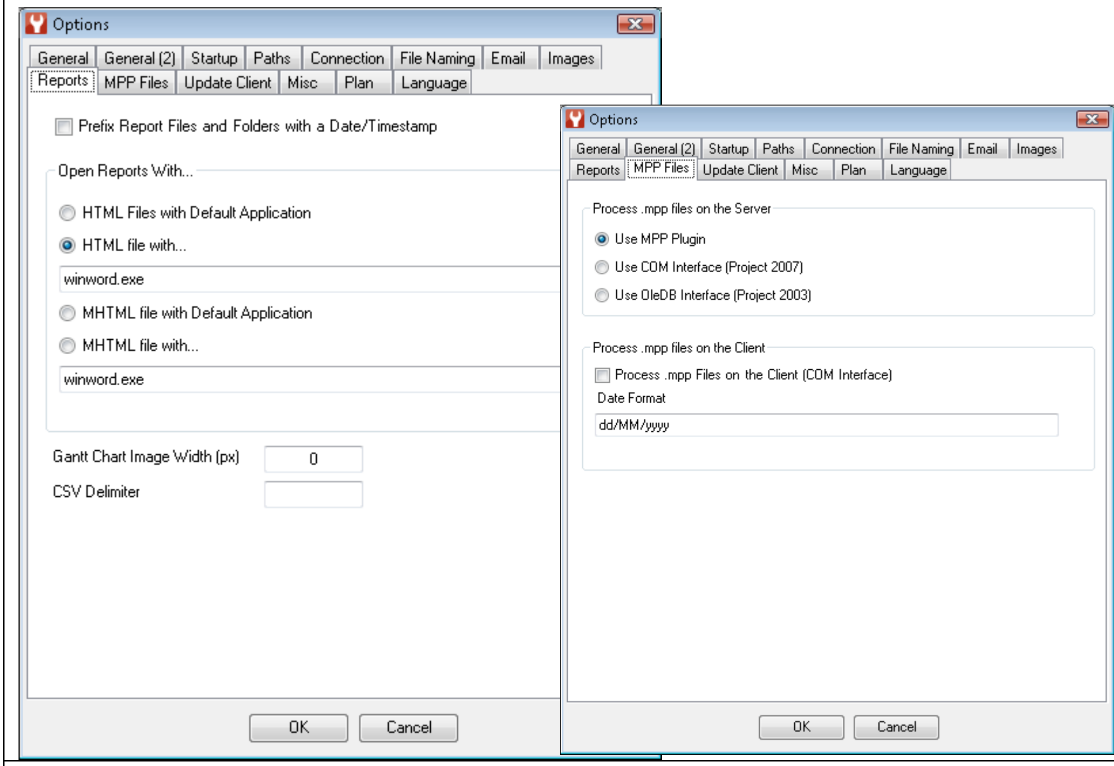
Overview

Users can set their own personal preferences for their local install of the client interface.

Steps

1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The Images Tab allows users to Auto-scale the Process Images (recommended) and also to start with the Windows maximised (this makes the application feel much more like Community Edition).
3. The Reports Tab enables the users to:
    a. Decide if they want to keep unique copies of every report run (create with date/timestamp) or not. This can be switched on and off as required.
    b. Determine the format (HTML or MHTML) the report content is to be created in and then displayed in (default or chosen application).
4. The MPP files Tab enables users to choose how and where to process data from MS Project files (.mpp) if used.

Screens



Notes

Creating reports as MHTML into the winword.exe application means they are produced into Word packaged with all graphics and styles so with Save as can be kept as word files, however this format doesn't support drill down so with a Portfolio report will just return the top level summary.

The recommended configuration for MPP file processing is the MPP plugin as this will not require a licensed Microsoft Project version on the client or server. The same MPP plugin is always used when processing .XER files from Primavera..

Client Install Options – Update Client and Language

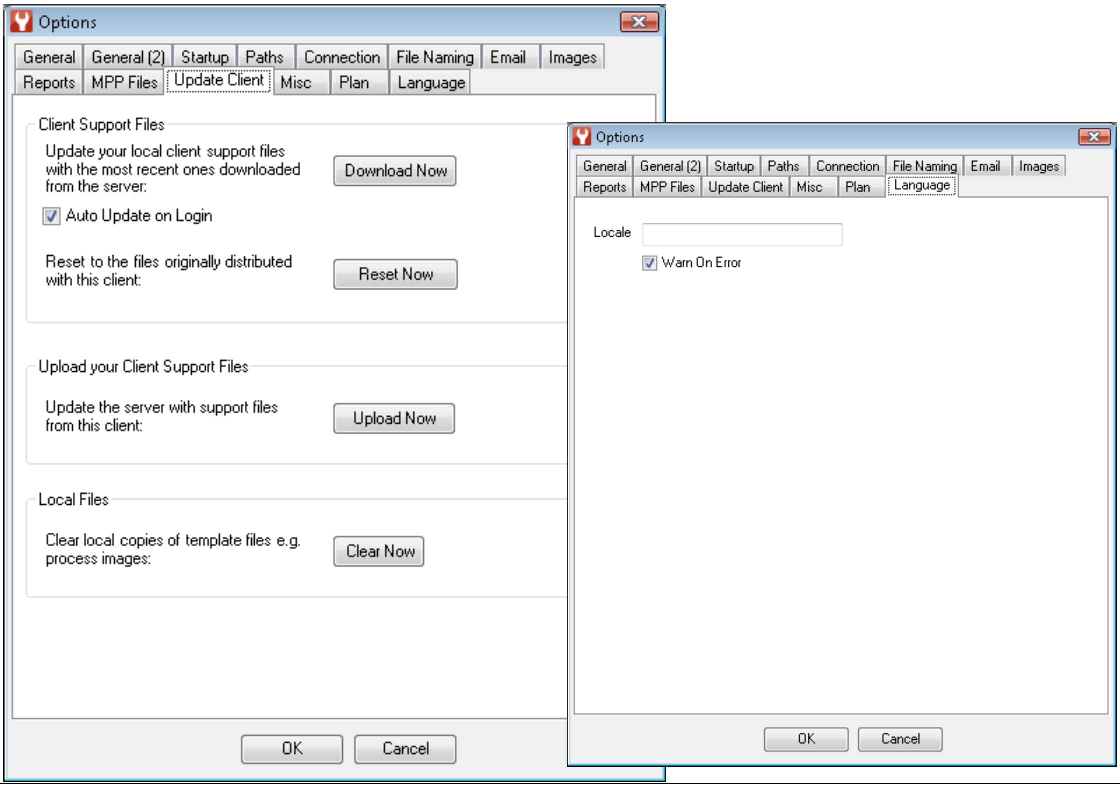
Overview

Users can set their own personal preferences for their local install of the client interface.

Steps

1. The Client Options form is opened from the Options (toolbox) quick click menu or Main menu – Admin – Options.
2. The Update client tab enables the user to:
    a. Control when and how their local reporting resources are updated from the server. By default this will be automatic on login, but the user can suspend that and request a latest set or reset their local set to the original set provided
    b. As a Manager licence user with Admin or delegated custom permissions you could upload your current local client support files to the server to become the master set. These would then be distributed to other users next time they logged on and used by the Enterprise Hub.
    c. Clear local files, which will remove locally cached navigation images, this needs to be done periodically when diagrams are updated within a method template.
3. The language locale the application uses will be picked up from Windows automatically and will use any matching language files it has. In the Language tab you can force a different selection if you wish. If your windows or the typed Locale cannot be found the default English will be used.

Screens



Notes

Client support files provide the icons used by the local application including RAG reporting, all report styles and the actual report XSL templates themselves. Editing these files locally enables the PM to customise their outputs away from the standard if required.

At version 3.2 the following locales are available (if installed) fr-be and nl-be.

Other Client Administration Issues

Client version

When reporting support issues with a client you may need to provide details about the version you have installed. The details most commonly asked are:

Question	How to find the answer
Customer ID number	Main Menu – Help – About gives both the client and the server version numbers (scroll area at the bottom)
Version Number	Main Menu – Help – About gives both the client and the server version numbers (scroll area at the bottom)
Install Licensing Information	From version 2.1.1 this will only be available from the Server Tool.
Client local Configuration File	Main Menu – Admin – Options then general tab provides a link to view your configuration file
SSL certificate	C:\Program Files\Project in a box Professional The PROJECT in a box test connection certificate should be located here and titled prosis-solutions-ca.cer, using this you can run a test secure connection to our hosted test platform (you will need to apply for a connection IP address).

Upgrade and Compatibility Issues

Users may experience some issues when running a different minor Client version to the server version (i.e. 1.1.0 and 1.1.1) although it is likely that this will just be an inability to access newer functionality. It is good practice to run clients and server to the same version but practically acceptable to roll out a campaign of client upgrades once the server is upgraded.

Enterprise Hub Client Administration Factsheets

Enterprise Hub Administration

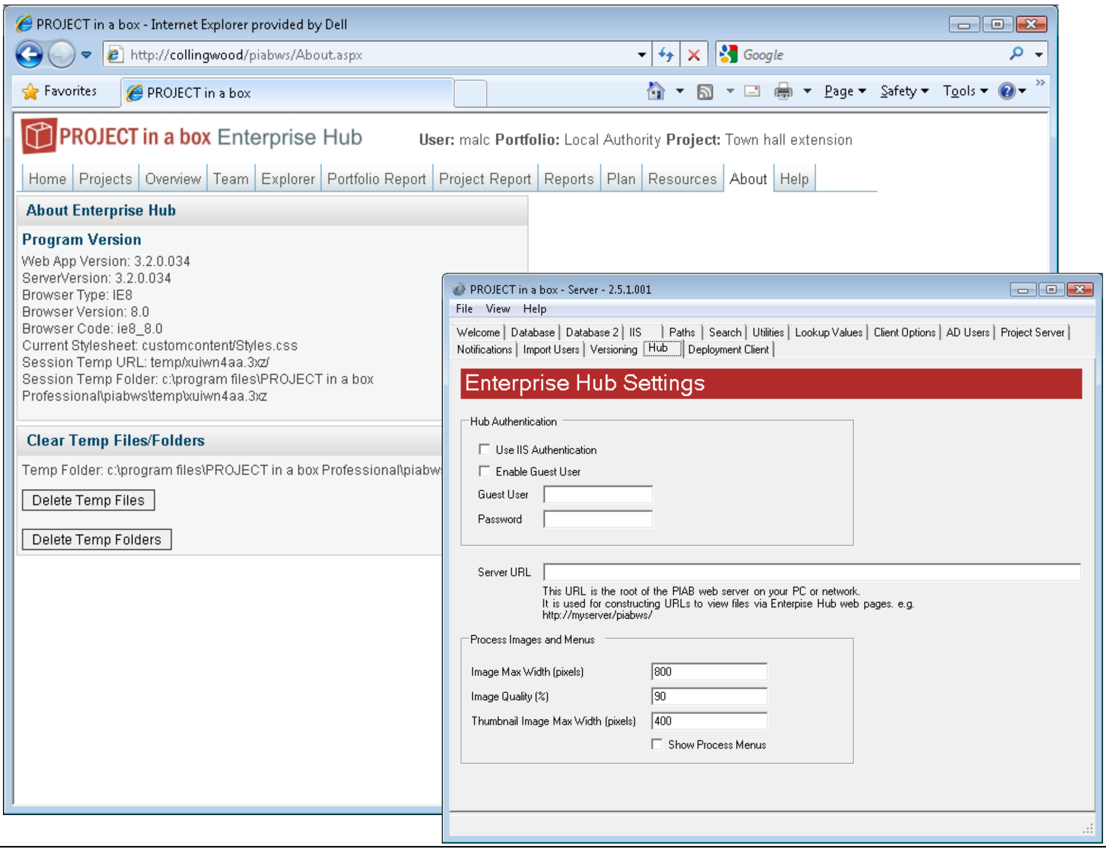
Overview

The Enterprise Hub offers extensive administration and personalisation to appropriate users or system administrators including content, style and access control.

Steps

1. The About pane on the Enterprise Hub enables an Admin user to clear the temp folder on the server. It also shows the user which browser is being picked up and the style sheet provided. If the users are reporting any browser layout issues with Enterprise Hub this information will be required.
2. There is a tab in the Server Console to enable an administrator to manage some key issues including IIS authentication and managing the Guest user account. With the addition of process diagrams since version 2.5.1 there are also setting to manage the display size of images and thumbnails.

Screens



Notes

System Administration Factsheets

Selecting a project method

Overview

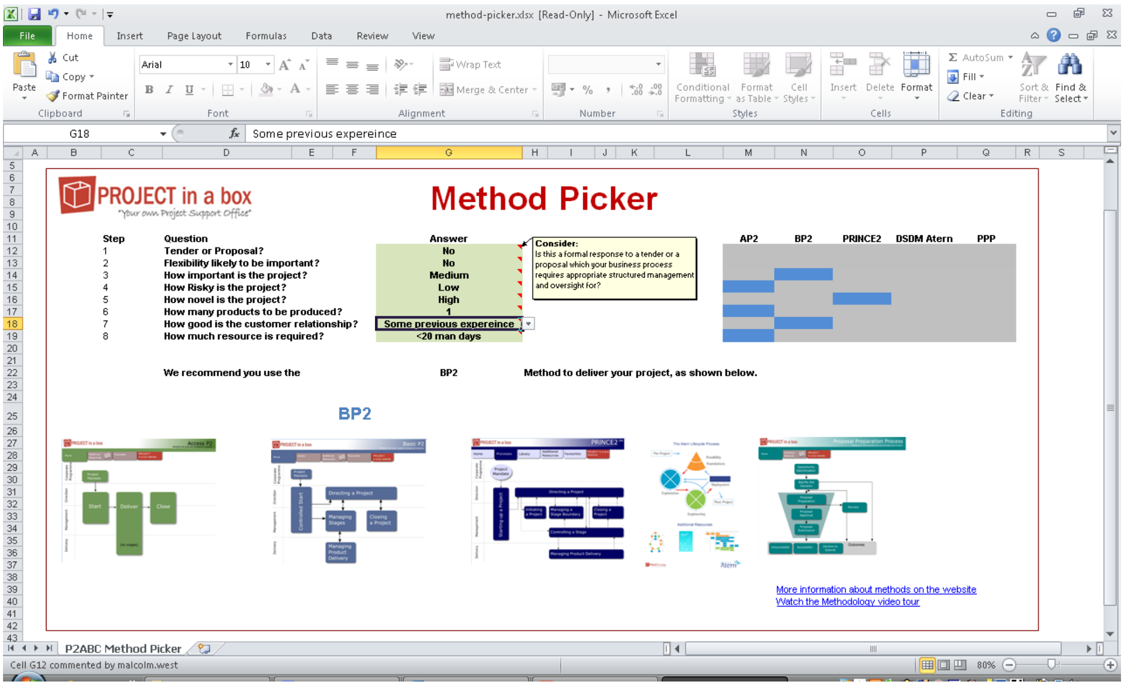
PIAB can support any number of project Method Templates each of which when used to create a new project from can provide different process diagrams, processes, documents and blank template files. The system is provided with four project method templates as standard AccessP2, BasicP2, CompleteP2 and Default PRINCE2.

Users can use the P2ABC button to launch the Method Picker and answer a set of simple questions to determine the template most suited to their expected project.

Steps

1. Open the Method Picker from the P2ABC quick click button.
2. progress through the list of project attributes answering the questions with your new project in mind.
3. The method picker will adjust as you answer each question indicating which method is recommended for use.
4. Once complete see the Adding a new Project topic to see how to create your project and consider saving your completed Method picker as a file for later review.

Screens



Notes

The Method Picker is a generic example and should only be considered as a guide. It is recommended that the method picker spreadsheet is modified to reflect your organisational culture, practices and the requirements of your project portfolio and industry. Contact support@projectinabox.org.uk for the password to make changes to the Method Picker.

Adding a new project

Overview

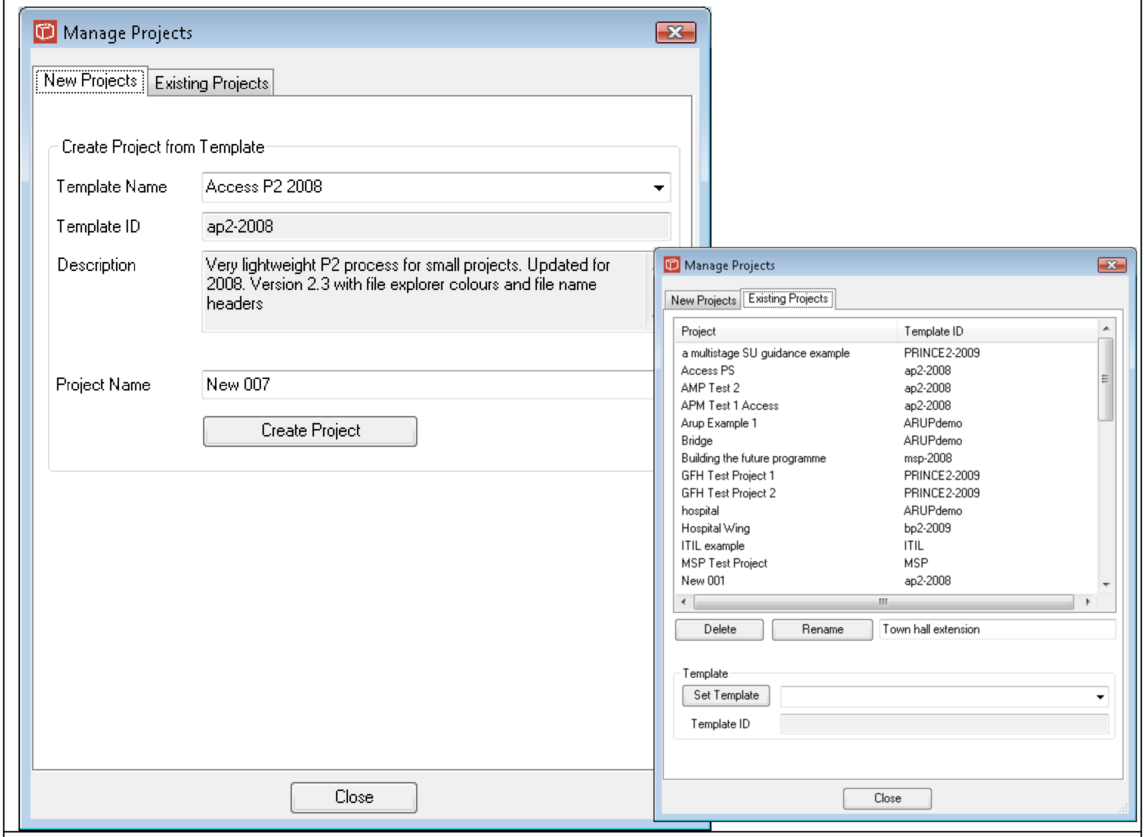
You can have as many projects as required within the system, adding each new project is straight forward. This operation can only be undertaken by a user with a Manager licence and Admin or delegated custom permissions.

The combination of the configuration files used to define which documents, templates, menus and navigation diagrams are shown for each process and the template files themselves are called the ‘Method Template’. Your system can have as many method templates as required and each one can launch a new project with an entirely or marginally different set of content. Further information is provided on setting up method templates later.

Steps

1. Open the Manage Projects form from Main menu-Admin and go to the New Projects tab.
2. Add your new project name in the dialogue box above the Create Project button.
3. Select your required Method Template from the template pick list above
4. Press the Create project button
5. Your project will now appear in the Projects list in the Existing Projects tab (the template type is identified next to it for convenience).

Screens



Notes

When a project is first created, the user who created it will be automatically given modify permissions and it will also appear in other Admin users project lists for information.

From the Existing Projects tab you can rename or delete a project and can also change the method template associated with the project. Great care should be taken if changing the method template associated with a project as it may prevent correct navigation.

Note the term ‘Project’ can be aliased in the Method Template and this will be reflected in the menu structure so if you have currently selected an MSP programme for example the Manage Projects form will be titled Manage Programme etc.

Managing Project Stages

Overview

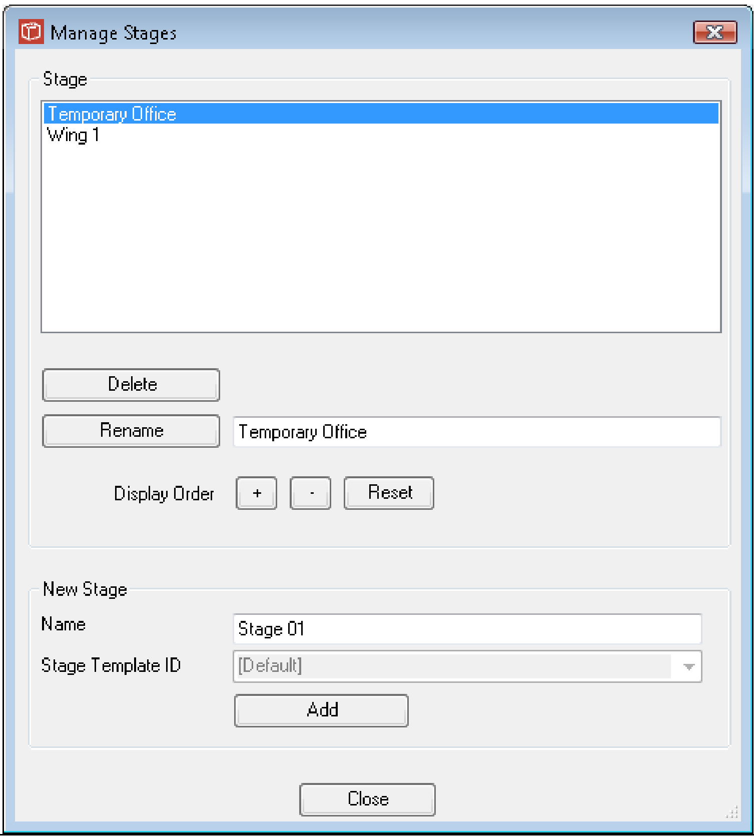
A project may have one or more stages and these can be added, removed and managed from the Manage Stages form.

Stages are also templated in the same way as a Project template and share the same template files folder to ensure consistency when stages are added to existing projects.

Steps

1. Open the Manage Stages form from Main menu-Admin
2. If you want to add a new stage Provide the name in the Name dialogue box, select the type of stage you want and press Add
3. To rename a stage select it by clicking on it in the Stages list, type the required new name in the Rename Stages dialogue box, then press the Rename Stage button
4. To delete a stage select it by clicking on it in the Stages list and press the Delete button.
5. Stages can also be displayed away from the default alphabetic view or reset to alphabetic.

Screens



Notes

From version 2.8 a method template may have multiple different stage types defined for it, each with a different set of documents. If only one stage type is defined the stage template ID pick list will not be available to select and will just display [Default].

Note the term 'Stage' can be aliased in the Method Template and this will be reflected in the menu structure so if you have currently selected an MSP programme for example the Manage Stages form will be titled Manage Project etc.

Delete a Project

Overview

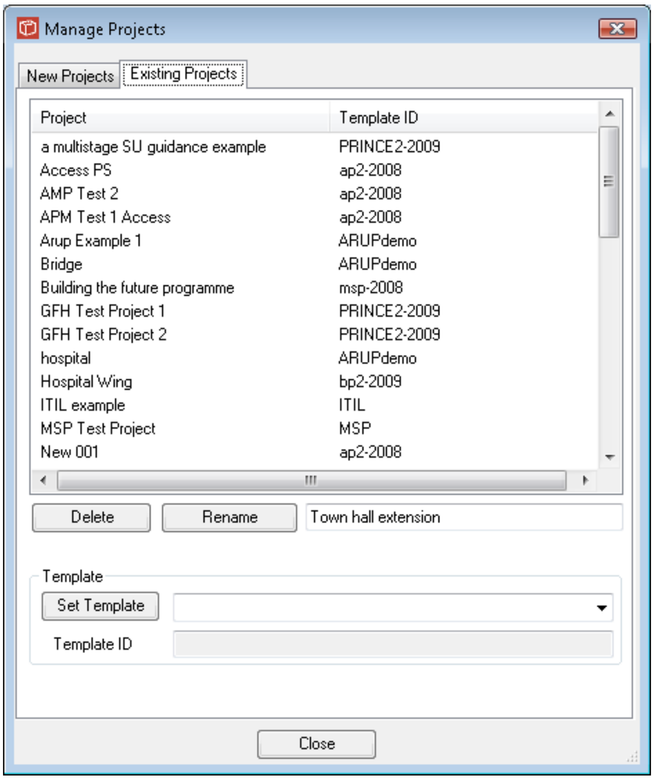
You might decide to delete a project once it is complete as a tidying up exercise or because a project was incorrectly set up or cancelled part way through its delivery. This can only be done by a user with a Manager licence and Admin or delegated custom permissions.

Note that this delete action cannot be undone and should only be undertaken if absolutely certain the project is no longer required. Users might like to first consider Exporting the project or using the Data Tool (from your customer resources page) to take a fully working copy which could be restored later if the delete isn't appropriate.

Steps

1. Open the Manage Projects form from Main menu-Admin.
2. Select the project you are interested in from Projects list in the Existing projects tab with a single left click.
3. Press the Delete Project button
4. A confirm window will be shown click yes to continue or no to cancel and return to the form

Screens



Notes

If a delete has been performed accidentally then the files themselves can still be recovered from the \doc file store but the structure of the project would have to be rebuilt unless there was a backup which could be restored containing the Project prior to deletion.

The Export feature can be used to create a user accessible export of the project which leaves the project behind on the server. The PIAB Data Tool can be used to remove a project, all its constituent files and reporting data (except user activity) from the server entirely in a machine exchange format which can then be archived or relocated to a new server if required.

Managing Portfolios

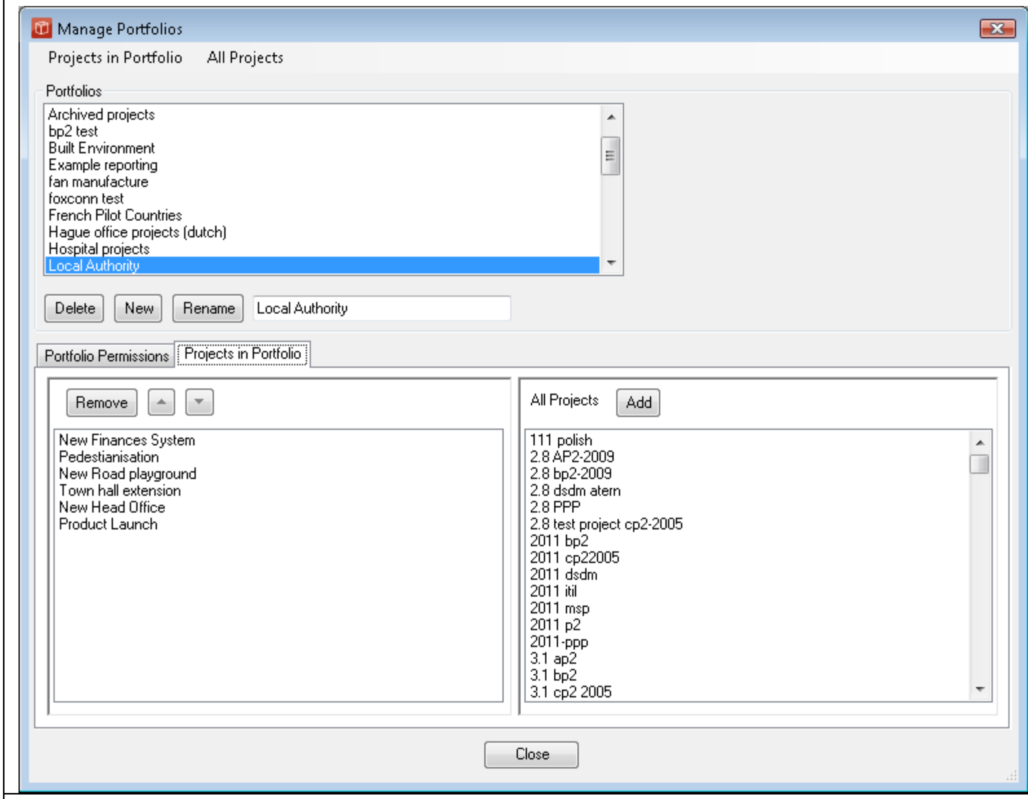
Overview

Portfolios are groups of projects. Any number of Portfolios can be created and each project can appear in as many Portfolios as required or in none. Users who have the Portfolio flag set against their account have access to see portfolios and this may activate portfolio communications and reporting depending upon individual permissions.

Steps

1. The Manage Portfolios form is accessed from the Admin menu and available for users with a Manager licence and Admin or custom delegated permissions.
2. New portfolios can be created with a name and the 'new' button or selected and renamed.
3. Existing portfolios can be accessed from the list and the current selected portfolio can then be acted on using the Projects tab below. Here you can include projects from the full list in the right hand side using add or take them out with remove. The + and – buttons allow display order to be changed.

Screens



Notes

Once a Portfolio has been created the Portfolio permissions will need to be set to enable it to be accessed by users. Even then although a user may have been given permission to view or edit the information for a Portfolio they will not be able to see particular projects in that portfolio if they have a 'no-access' permission on that project. In this regard Project and Portfolio permissions need to be used in conjunction to get the desired results.

Portfolio Permissions

Overview

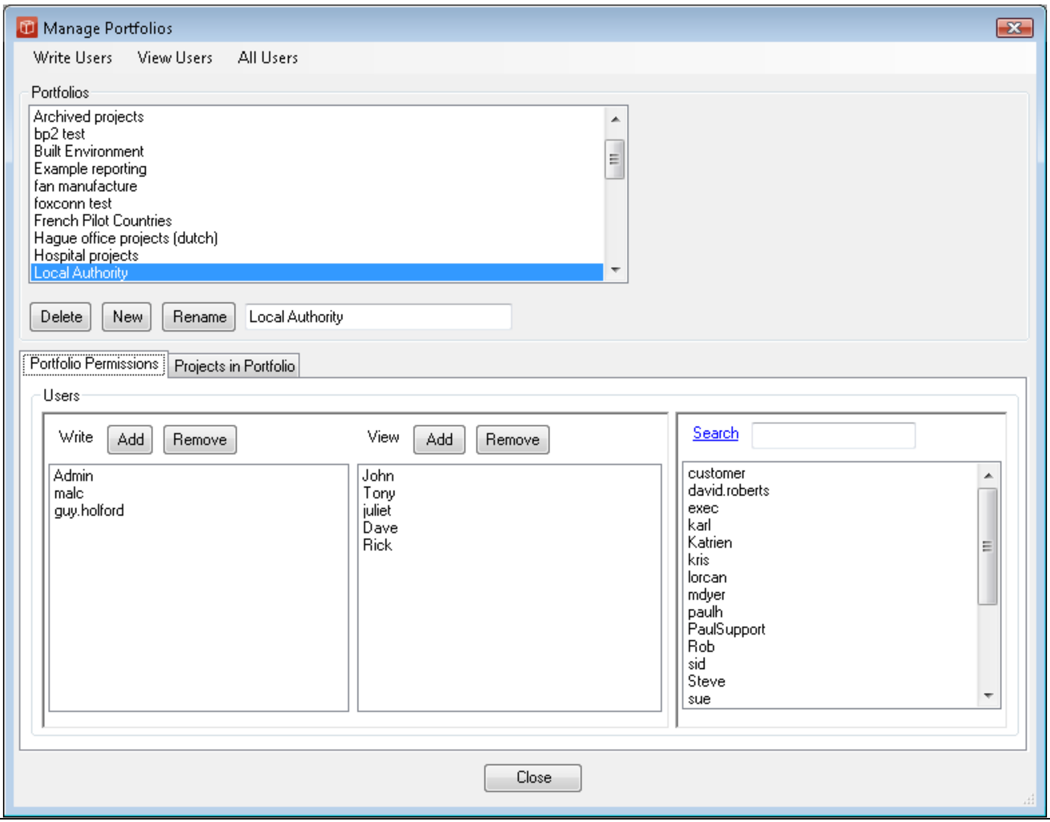
Portfolios are groups of projects. In order for users to be able to access and work with any portfolios they must have a Manager licence and the Portfolio flag set on their user permissions.

The following steps below then allow them to use or edit the summary information on particular portfolios from those set up on the server.

Steps

1. The Manage Portfolios form is accessed from the Admin menu and available for users with a Manager licence and Admin or custom delegated permissions.
2. Select the Portfolio you want to adjust permissions for from the list then select the Users tab in the lower part of the form.
3. To allow a user to view the portfolio select them in the users list and then click add in the view area. To deselect from View, click on them and press remove.
4. To allow a user to edit the Portfolio Summary information, select them in the user list and press Add in the Write area. To deselect, highlight them in the list and press Remove.

Screens



Notes

Even then although a user may have been given permission to view or edit the information for a Portfolio they will not be able to see particular projects in that portfolio if they have a 'no-access' permission on that project. In this regard Project and Portfolio permissions need to be used in conjunction to get the desired results.

User Administration

Overview

Access to all features of PIAB is permissions controlled and at the heart of this is the user account. Each user must be verified by the system to identify their user account to determine which projects they can access and what functionality they can use.

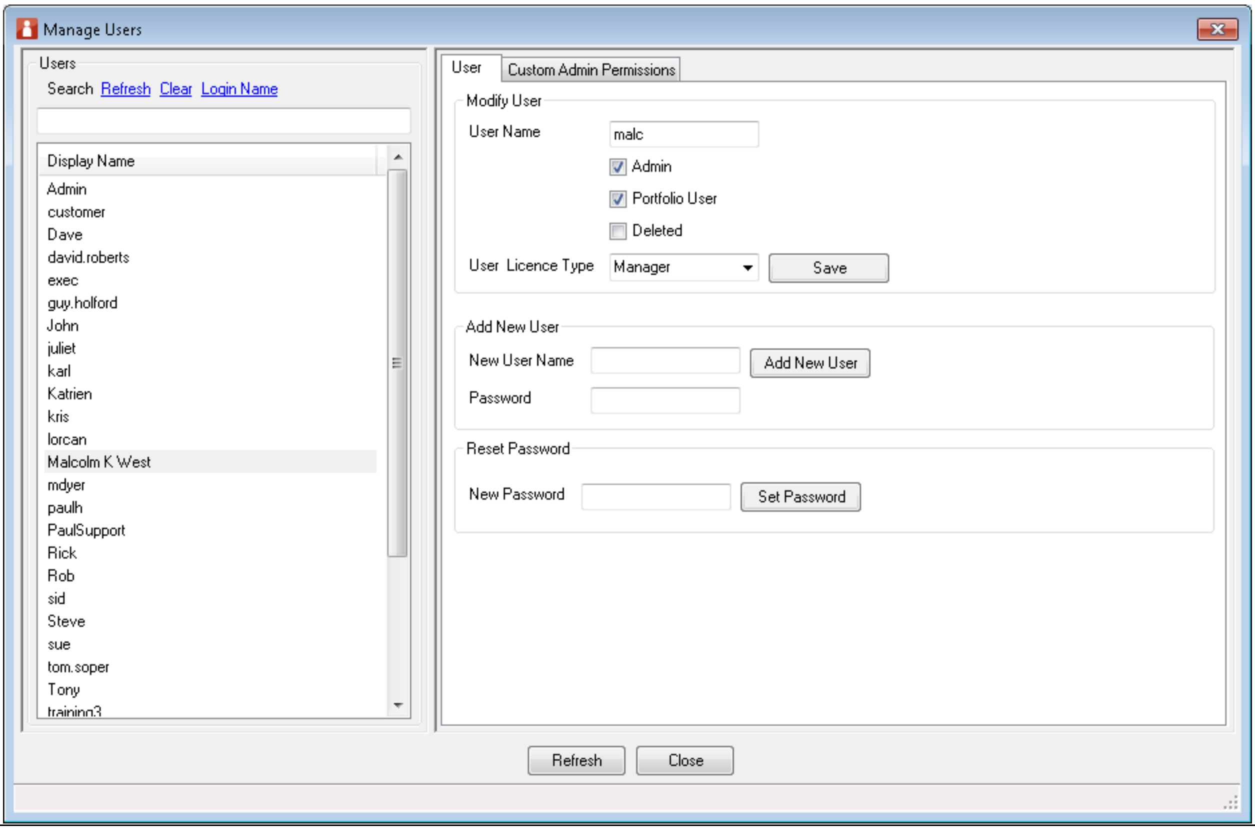
Individual users can be added as shown here and edited or marked as deleted. Bulk user creation can be undertaken on the server tool with load from Active Directory or spreadsheet.

Users often have a system name, perhaps to match their windows login when using Windows Authentication and can also have a display name (set in the user details form). If the user has a display name this will always show everywhere for that user in preference to their login or system name unless that is set on (see Login name link above the name list).

Steps

1. The Manage Users form is available to a user with a Manager licence and the admin flag or delegated custom admin permissions and found on the Admin menu.
2. To add a new user provide a username and password (no special characters or spaces permitted, max length 12 characters).
3. Once the user is created they can be selected in the user list left and then granted a licence and given Admin rights and if required the ability to see Portfolios. Changes in this Modify user area must be saved using the button in that part of the form.
4. From this form a users Password can be reset and if required the user can then change it themselves on the User details form.

Screens



Notes

Where users require some admin like capabilities but not the full set these can be granted as Custom Admin Permissions see below.

The user list will return 50 users, if dealing with more users than that then the search form will allow exact and wildcard name searching. %wes% will return West, and newest.

Admin and Custom Admin Permissions

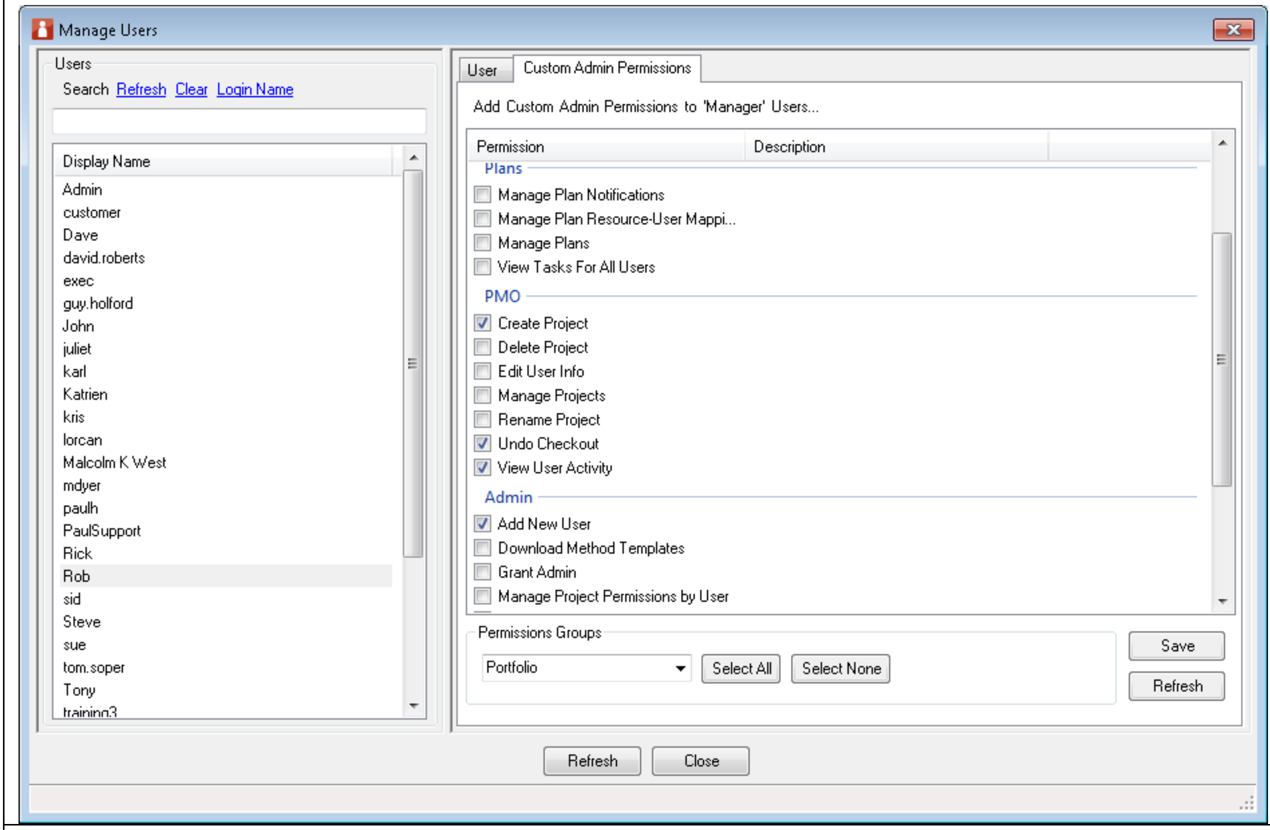
Overview

Most users just require Project permissions to control their actions day to day delivering projects but users who manage the system require some administrator permissions at a level above allowing them to create and manage users, projects and portfolios and other actions required to keep the system functioning. The Admin flag set in the user form gives that user the full set of admin capabilities but many users only require smaller parts of the admin permissions. This Custom Admin form allows selected parts of the Admin role to be granted to any user who has a Manager licence.

Steps

1. The Manage Users form is available to a user with a Manager licence and the admin flag or delegated custom admin permissions and found on the Admin menu.
2. Ensure that the user has a Manager licence allocated and then select the Custom Admin Permissions tab.
3. The permissions are listed with descriptions as required and grouped into three areas 'Admin', 'Portfolio' and 'PMO' and these collections can be applied or removed en bloc using the permissions group pick list at the bottom of the form. Individual boxes can also be ticked or unticked for finer control until the desired combination is achieved for the user and then the save button will confirm them.
4. For permissions to take effect the user will have to logout and log back in again

Screens



Notes

If the user is at any point changed to a Team, EH or contact only licence, or given the full Admin flag their Custom Admin permissions form with grey out and the settings will not apply to their user account. If they are reverted to a manager licence or full Admin flag removed, the previously saved settings will reapply.

Project Permissions

Overview

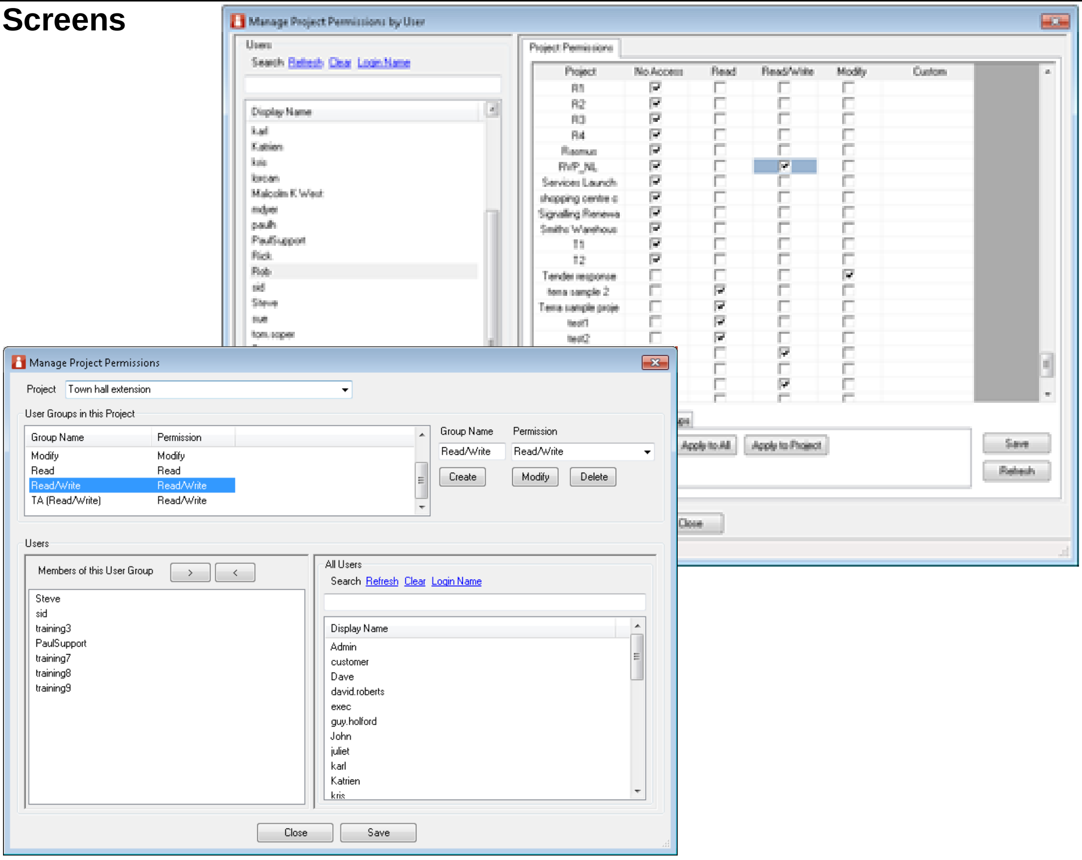
Project Permissions are at the core of managing what each individual user can do on a project. In practice the system keeps a record of which permission group each user has on each project and there are two forms that can be used to see and manage this information.

The main one used from an Admin perspective is the Manage Project Permissions by User form and this is only available to users with a Manager licence and either the Admin flag or appropriate delegated custom admin permissions. This form allows the user to select a single user and see what type of permission they have on every project on the server. The form is well suited for allocating projects to a new user once created.

Steps

1. Select the Manage Project Permissions by User form from the Admin item on Main Menu.
2. Select or search and select your user from the pick list and the matrix to the right will then display the users permissions by project. The Permission on each project must be one of five types: No Access, Read, Read/Write or Modify (shown by tick) or may be a custom permissions group which would be displayed in the far right column instead.
3. Wholesale changes can be applied to all projects using the standard pick list at the bottom of the form. Particular custom groups applied to selected projects or individual boxed in the matrix ticked or unticked to produce the required combination
4. Changes must be saved with the save button before moving to the next user.

Screens



Notes

This 'by user' view is good for setting up a new user but not helpful to a Project Manager who may have many users to manage on one project and for that job there is the Manage Project Permissions form which is addressed in the Project Manager as Admin topic.

Project Manager as Admin

Overview

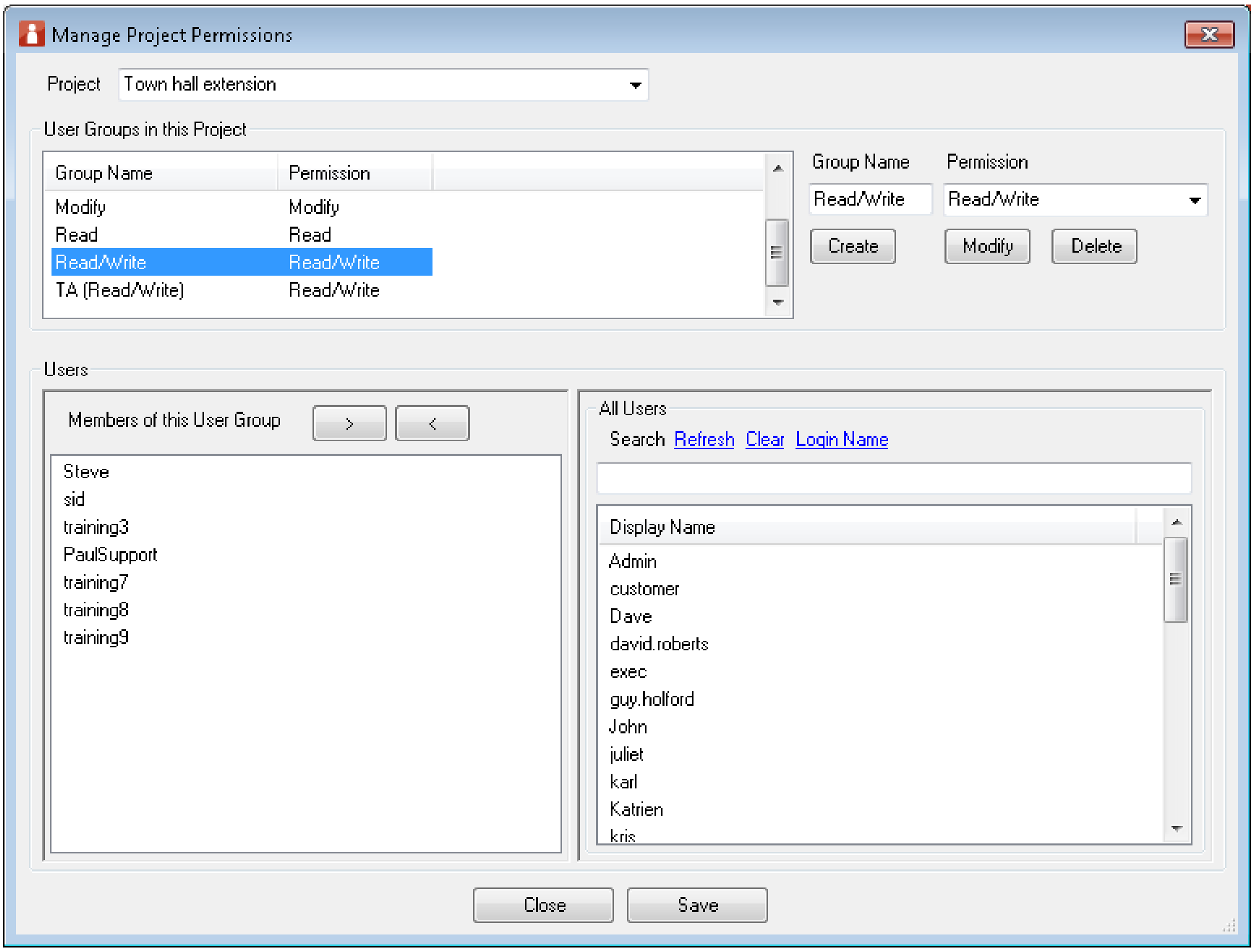
Since version 2.1 a user with Modify permissions on a project is treated more as the project Manager/Project administrator and in addition to being able to customise the project content can also administer some areas of the project life as follows.

To access these capabilities the user will require a Manager licence and modify permissions on the current project.

Steps

1. Add or remove users from the project – using the Manage Project Permissions form. Also alter the level of access and create custom user groups.
2. Set Document Permissions for a project – via the Permissions link on the File explorer for the document currently in context or the Manage Documents and Notifications form
3. Manage Stages – add, rename or remove stages as well as reorder them using the Manage Stages form.
4. Access the 'Admin' type reports for Projects where they are Modify user only – this includes 'What's Changed?' and the 'User Activity' reports.

Screens



Notes

Using this form the PM, Admin or another user with project Modify permissions can control access to the project. Select the desired permissions group from the list and then below you will see users who are members of the group. Any users can then be moved into or out of the group using the arrows and changes saved.

The form also allows custom permissions groups to be created with a name and a starting permission level. Users can be invited to these groups in the same way as to standard permissions groups. Custom groups are very helpful in complex project environments by providing the PM with additional user types e.g. creating a Customer group to place external customer users in, to which different document permissions can be granted giving them a different view of the project documentation.

Document Permissions

Overview

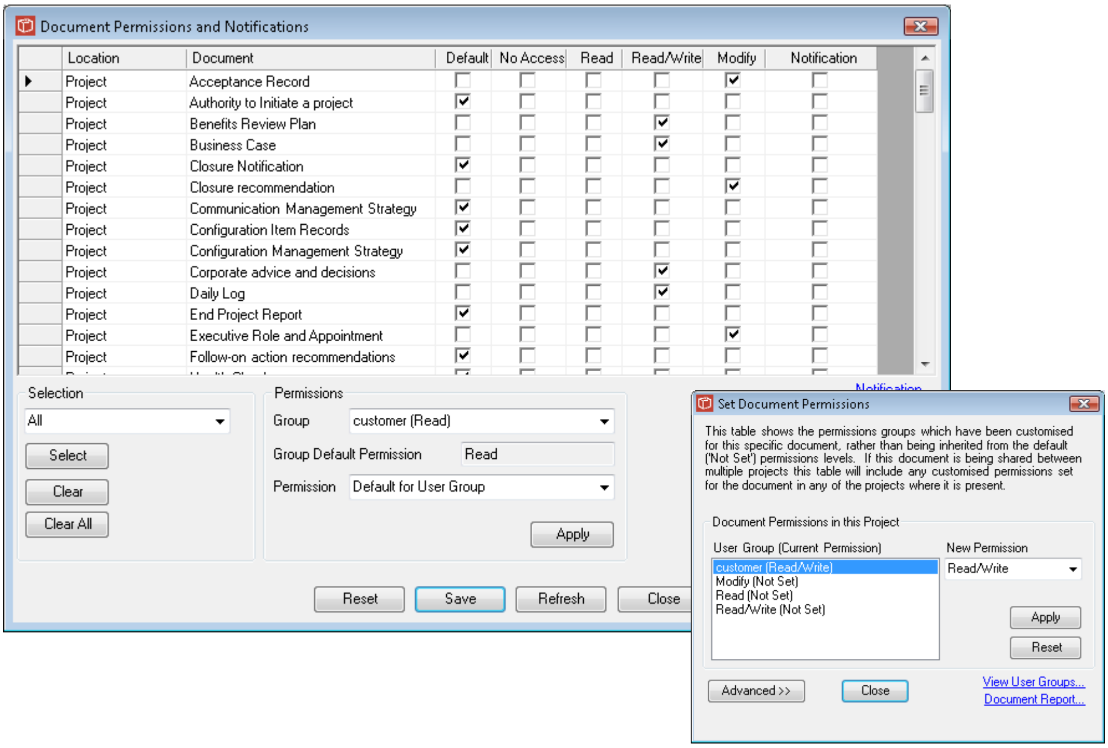
In a simple and open project environment every user with access to the project will be able to see every document and its constituent files and the levels of access can be granted simply by moving a user into a different permissions group. e.g Read/Write gives read write access to all docs, Read gives read to all docs etc.

In real world projects though user profiles are more complex and perhaps you may not want the typical read user to be able to access the finances but you may want them to have Read/Write access to the risk log or daily log. This is achieved by altering the permissions for their user group at the document level, either one document at a time or across all docs on the project.

Steps

1. The Document Permissions and Notifications form is accessed from the Manage Documents link on the Admin menu and is available to any user with a Manager licence and modify permissions on the current project.
2. Select the Permissions group you want to modify and you can then see in the matrix against each project document whether the default permission still applies or if a fixed different permission has been set.
3. To alter the permission either tick a box in the grid or use the selection pick list to elect a group of docs (eg all stage 1) and the permission picklist to make them all 'read', 'modify' etc.
4. Save commits changes for that permissions group you can then select a new permissions group and repeat.

Screens



Notes

The form also shows which documents have notifications set and the by selecting the document row and clicking the Notification link the notification form can be opened to edit.

When working in the project itself a modify level user with a manager licence can change the permissions for the current document using he permissions link which opens the Smaller Set Document Permissions form. In Simple more this form allows any of the permissions groups to be selected and a different level applied to it. In advanced mode it allows management of document permissions on shared documents.

Project Roles

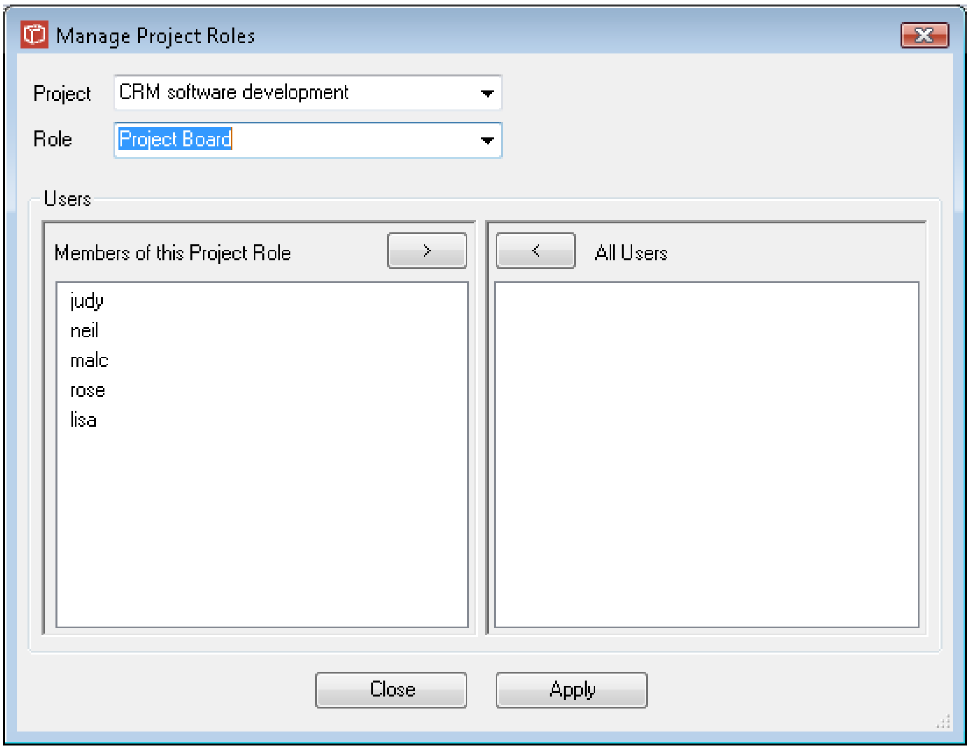
Overview

This form can be used to identify which users are undertaking which roles on a project. The information is then displayed in My details, in Project Reports but most importantly can be used to select users in the Communicate with other users form. This allows you to set rules for an email group, e.g. 'All people who are on Project Boards' and as individual users are added and removed or projects finish the rules will update this saved list for you.

Steps

1. The form defaults to the current project but this can be changed using top pick list.
2. Select the role on this project you want to define users for
3. A list of all users appears in the right side of the form, select the ones you want to add to this role and use the arrow button to move them across, deselecting users is the opposite.
4. Once you are happy with the role press apply and select the next role or close.

Screens



Notes

If required the Role definition list is Method Template specific and can be altered can be altered for all projects using the same method template with Method manager.

Managing User Accounts

Overview

From version 2.1 onwards licences are managed centrally from the server and allocated to users as required for the projects currently being delivered. This allocation of licences to users is undertaken on the Manage User Accounts form.

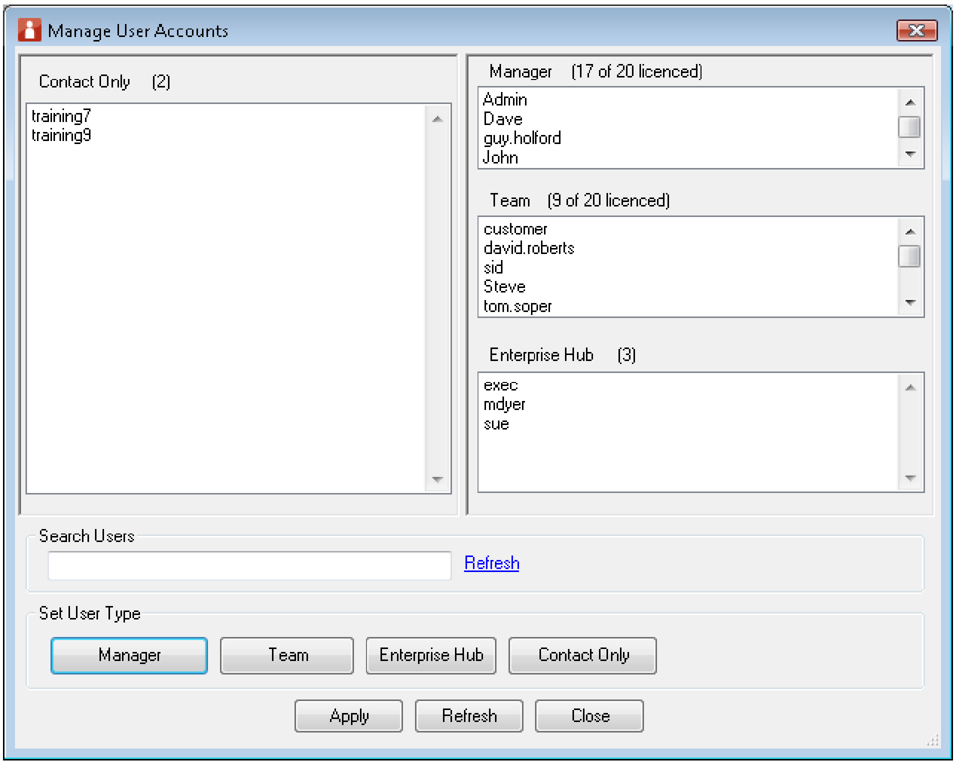
This functionality can only be accessed by a user with Admin permissions from a PIAB Manager client.

The form shows the four account types (Manager, Team, Enterprise Hub and Contact only) and indicates which type each user is currently in.

Steps

1. This form is accessed from main menu – Admin – Manage User Accounts
2. To move a user from one type to another simply click on the user where they occur in the form and use the buttons in the Set User Type area to allocate the user to a different type.
3. The buttons will only be available for the types which can be assigned to that user (i.e. will not include their current type nor any type which has reached its maximum permitted limit). If a type has reached its limit an existing user will have to be removed to allow your new user to be added.

Screens



Notes

The Admin account cannot be moved from Manager type as this account must always have Manager level functionality. Users with a Manager or Team licence will automatically be able to also access through the Enterprise Hub or the .NET Client.

Enterprise Hub users cannot access via the .NET client but can do so through the hub. Contact only users cannot access the system at all but can be assigned to project resource teams so that they appear in project lists for news letters or to enable quick distribution of documents to them through the Outlook integration facilities.

Managing Plans

Overview

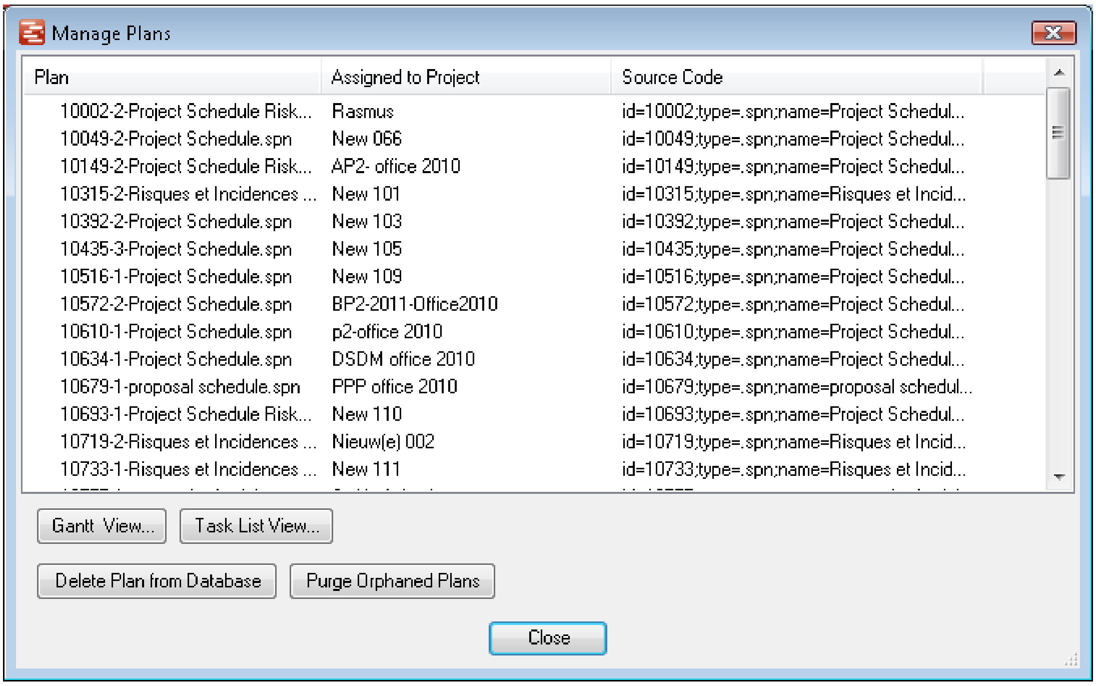
This form is for centralised management of plans currently held in the planning database. The form is for Admin users or those with delegated permission and having a Manager licence.

Once a plan is set up as a source and either forced into the database or checked out and back in to be added/updated automatically the plan will stay on this list until it is removed either by deleting the project or removing the file as a nominated plan for the project.

Steps

1. This form is accessed from main menu – Admin – Manage Plans
2. Click to select a plan and then choose from the buttons below to view the task list or Gantt chart view.
3. Plans can also be deleted from the planning database here

Screens



Notes

The Purge Orphaned plans option will cross check the plans held in the planning database against the plans listed on active projects. Any plans still in the database but no longer required by the projects on the server (because the source plan file itself has been removed from the project or the entire project deleted) will be purged from the planning database.

Managing Plan Resources and Users

Overview

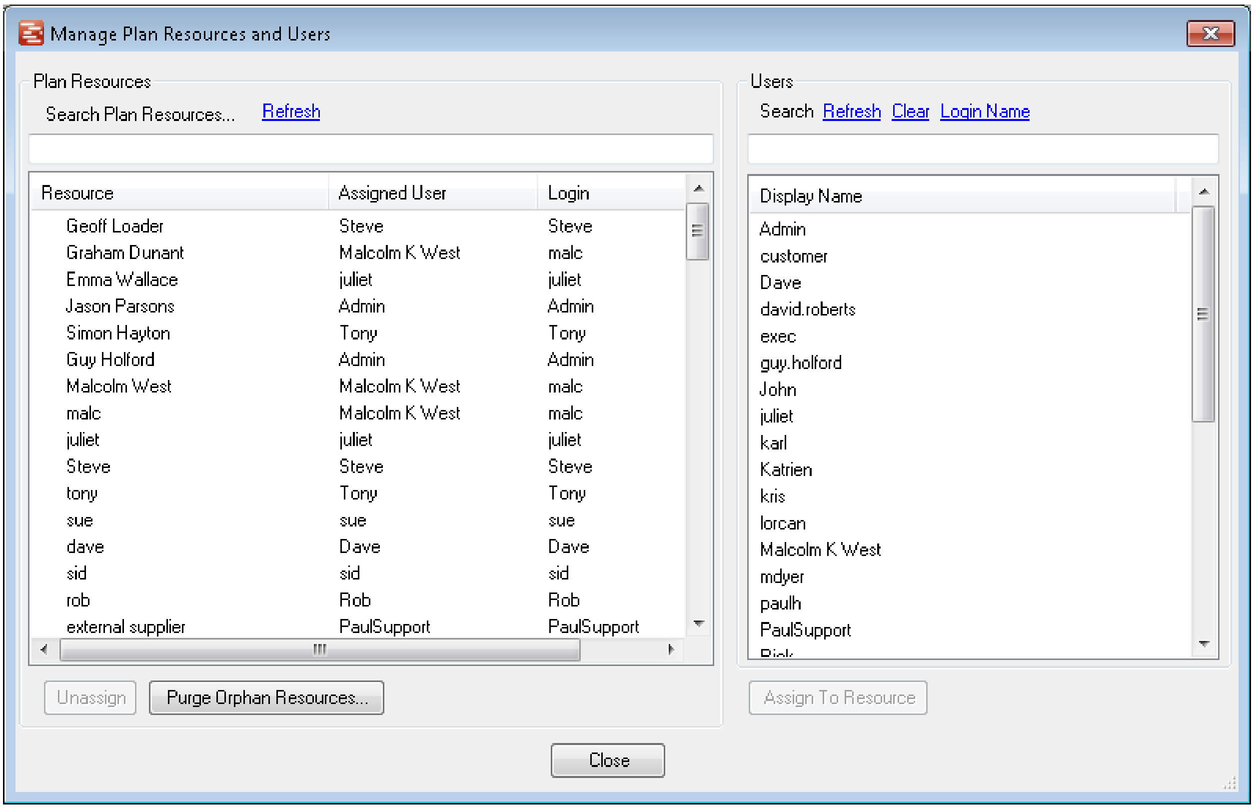
A key aspect of the planning and resourcing capability is tying together the names listed as allocations on tasks in the source plans with your PROJECT in a box users. This is especially the case when different usernames are used on different plans. This form provides the answer to that issue allowing you to tie task resource names to PIAB users.

A user can be assigned to any number of Plan resources in the system.

Steps

1. This form is accessed from main menu – Admin – Manage Plan resources and users
2. The list on the left side 'Plan Resources' lists all the resource names used in every plan currently held in the planning database and shows which PIAB user is assigned to that resource name.
3. To add or change an assignment simply click to select the row you are interested in and then find the user you want to assign in the Users list. Click the user in the user list then press the Assign to Resource button.
4. To unassign, select the row and use the unassign button.

Screens



Notes

Both lists will automatically show the first 50 entries and the search field at the head of each list enables you to search beyond that.

The Purge orphaned Resources button will check the resource names against the planning database and remove any names which are no longer used in current plan tasks.

Managing User Tasks

Overview

The normal User tasks and User tasks as Gantt forms are only available for the currently logged on user and they take account of the users project permissions so the user only sees tasks on projects they have permissions for.

These two forms are designed for administrator (or delegated admin) users and as such override both the earlier conditions allowing you to select which user(s) you want to see all the tasks for. This access may be provided to department managers or resource managers.

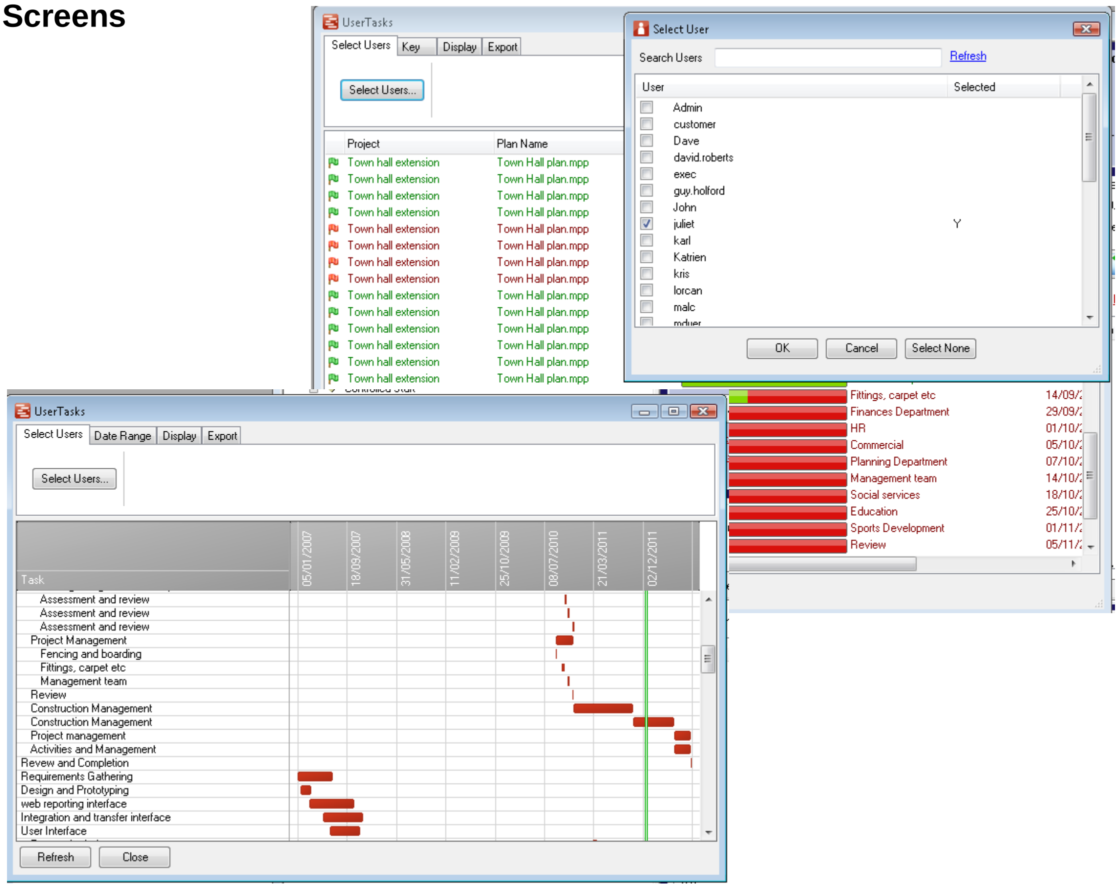
As discussed earlier the display can be either as a Task List or a Gantt chart view.

Steps

These forms is accessed from main menu – Admin – User Tasks or User tasks as Gantt

1. First select the PIAB user you want to see the task list for. Using the select user tab and form. Multiple users can be selected. The current user will always be shown as default and you should deselect them.
2. The remained of the forms with Display date range and export type options are as described for the original Task list and Gantt Chart forms.

Screens



Notes

Exporting a project

Overview

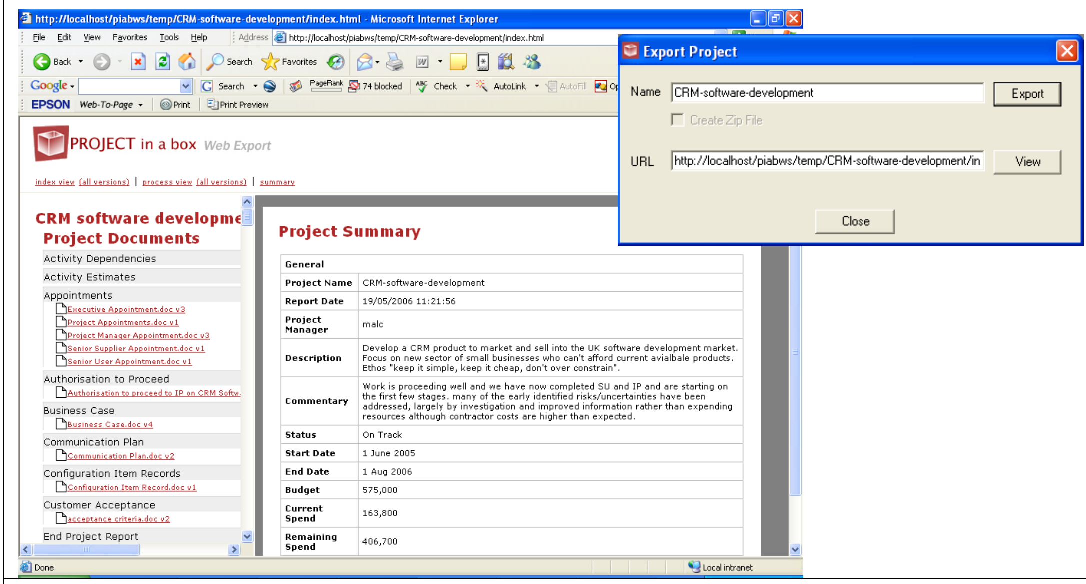
The export format for a project is very handy way of archiving the project or sharing it in a static way with users who have no system access. The export contains a copy of every version of every file included in the project (except those with the ‘exclude from export document flag set) which is provided in a folder along with a browser front end which enables users to access and view the files.

Export is only available to Admin users with a Manager licence.

Steps

1. Export is accessed from main menu – Admin – Export Project.
2. The name of the current project is shown for confirmation and then press the Export button to start the process.
3. When complete the URL field will be completed to show where the resultant export file has been placed.
4. Use the view button to bring the export up to view it.

Screens



Notes

The export contains the entire project including stage and Specialist product content as well as the current project commentary.

Exports are created and stored in a location on the server, you may need to contact your administrator to have the export folder you created passed to you. If this is the case provide the URL as an identifier for the export you require.

Viewing the server log

Overview

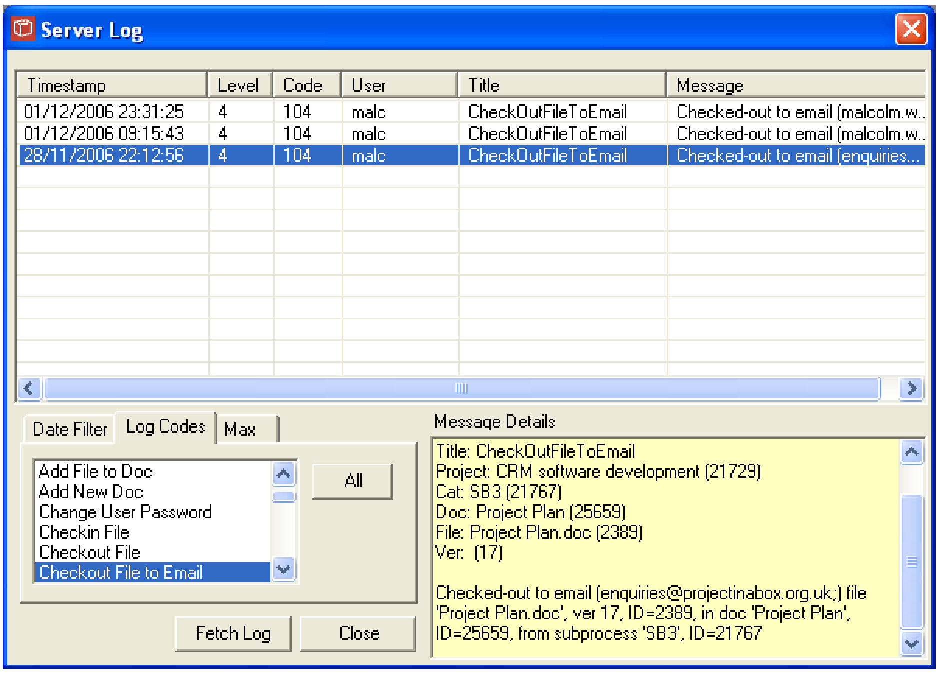
The Server Log records the actions and requests from users (including admin) for files or other actions. This information is the raw material for activity reporting and provides a more complete audit trail for the system including noting which users deleted files and when this was done. The log is actually stored in a table in the system database and can be searched and viewed by the admin user.

The Server log is only available to Admin users with a Manager licence.

Steps

1. The Server log can be viewed from Main Menu – Admin – Server log – Show Log or Show raw log. The raw log is the table exported into XML and with some practice can be used to determine the actions undertaken by users. The View log option provides a filter/engine to enable you to look for particular items (below).

Screens



Notes

Access to the log has been provided for admin users who want to chase down particular actions and get the full detail. This can be particularly useful when tracking down the FileID for a file which has been accidentally deleted by a user who now wants to recover it from the file store.

Server Tool – Backing up the system

Overview

The Server Tool (grey cog Icon) is provided to support the set up and configuration of implementations of PIAB although many of its features can be undertaken by knowledgeable IT support and DBA staff from the native packages and systems. Server Tool brings them together into one place and simplifies their operation for less experienced users.

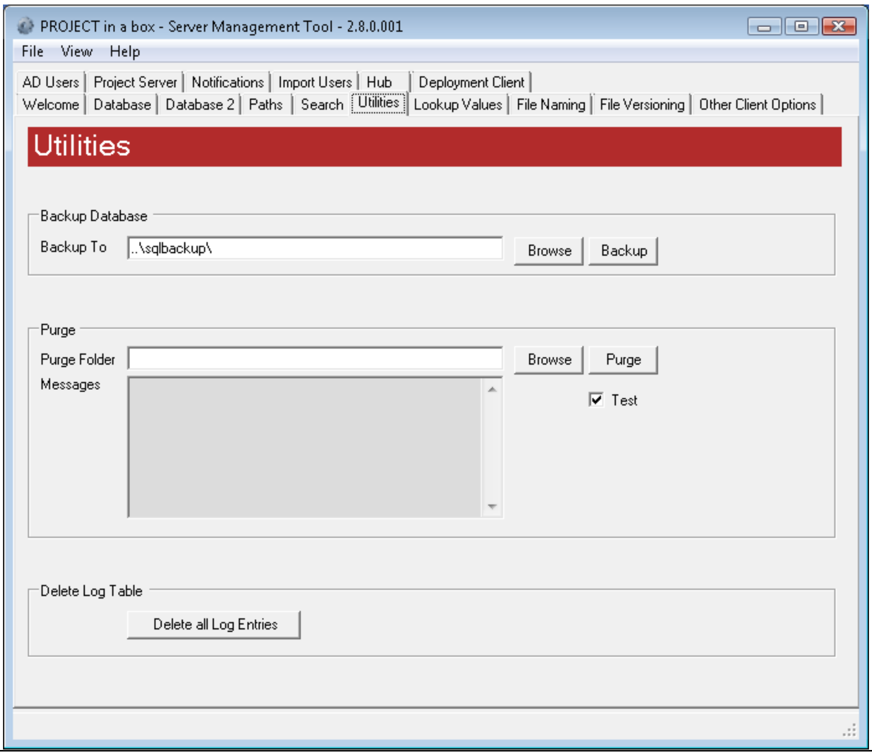
For all the functionality of the Server tool to work it must be operated on the computer which hosts the server (if the server installation is split using one of the recommended patterns then this means located alongside the server application rather than the database). In practice a system administrator may choose to access it using terminal services or similar from a remote PC.

It is very important from a business continuity perspective to back up your PIAB server to ensure that if the hardware fails or is a user deletes material in error this may be recovered.

Steps

1. Start the Server tool from the desktop icon.
2. Select the Utilities tab.
3. Check the location of the Backup storage using the Browse button, we recommend this storage location should be on a different computer and preferably be included as part of your regular back up to tape/continuity plans
4. Modify the .bak file name in the Back up To field to add date and time then press Back up.

Screens



Notes

Backing up the database important but this is only half of the story, the document store (\doc folder) should also be backed up in a similar manner on a route basis, consider zipping and sending to the same location as the .bak file. If you have modified or added to your \templates folder you might consider including this in a structured approach to backing up your system.

If you are using customised Method templates these should also be backed up using the same method as for the document store.

Backups don't have to be performed with the Admin tool if you already use SQL Agent or a proprietary product like VERITAS this is also acceptable.

Server Tool – Restoring from a Backup

Overview

The Server Tool (grey cog Icon) is provided to support the set up and configuration of implementations of PIAB although many of its features can be undertaken by knowledgeable IT support and DBA staff from the native packages and systems. Server Tool brings them together into one place and simplifies their operation for less experienced users.

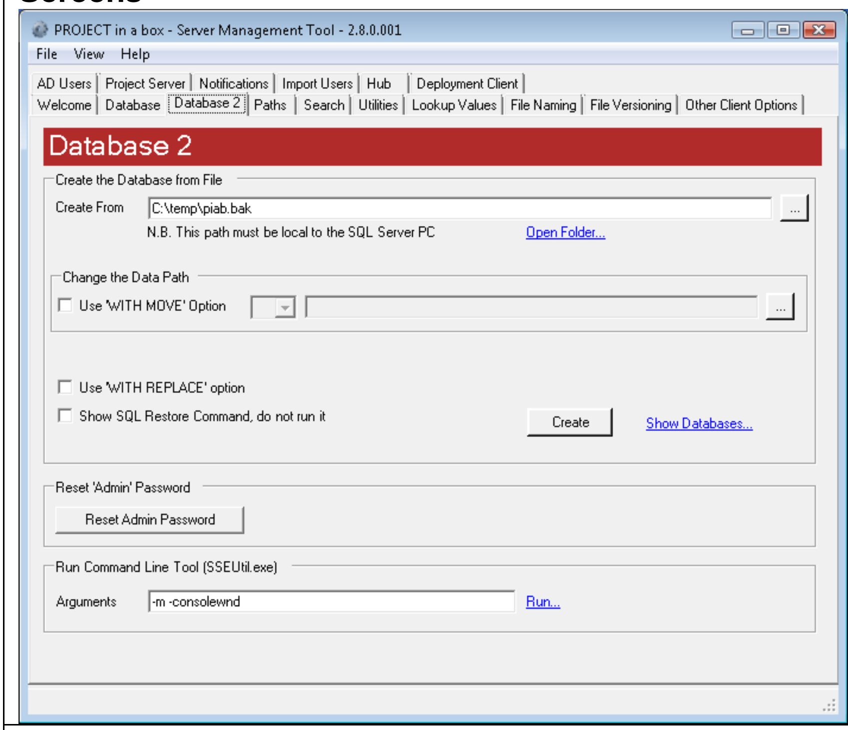
For all the functionality of the Server tool to work it must be operated on the computer which hosts the server (if the server installation is split using one of the recommended patterns then this means located alongside the server application rather than the database). In practice system administrator may choose to operate it using terminal services or similar from their own desktop PC.

You may be restoring from a backup because you are moving your server or recovering from a hardware failure, or similar.

Steps

1. Start the Admin tool from the desktop icon.
2. Select the Database2 tab.
3. The Create Database from file feature used in the restore is the same one used when setting up and configuring a new database.
    a. Use the Browse button and form to go to the most recent (or other desired) back up file.
    b. Press create and then accept the confirmation form if you are sure you want to complete the operation. **Note that the restore replaces your current database with a previously saved copy you should only do this if you are absolutely sure this is required (you would be advised to first take a back up of the current database before restoring a previous copy)**

Screens



Notes

If the restore is to a previous version of database then all the required files should be present but there may be newer files here that could cause potential clash when the system tries to create them later (not expecting them to already be in the Document store. You are therefore recommended to either Purge immediately after a restore or to recover the matching \doc and \template folders to replace the current ones.

Server Tool - Licensing

Overview

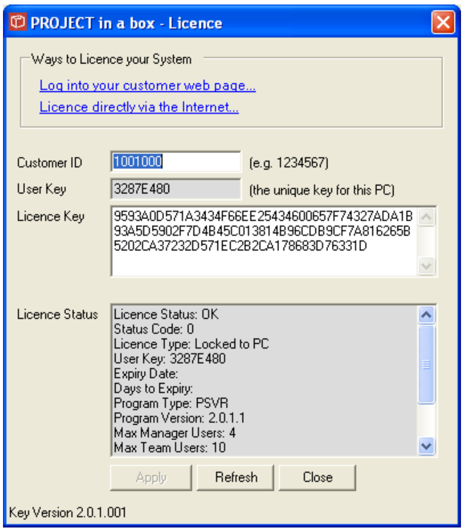
As explained in Managing User Accounts above access to the system is managed by allocating licences to users. The overall licence which dictates the number of users of each type that a server can allow is held and managed on the Server Tool.

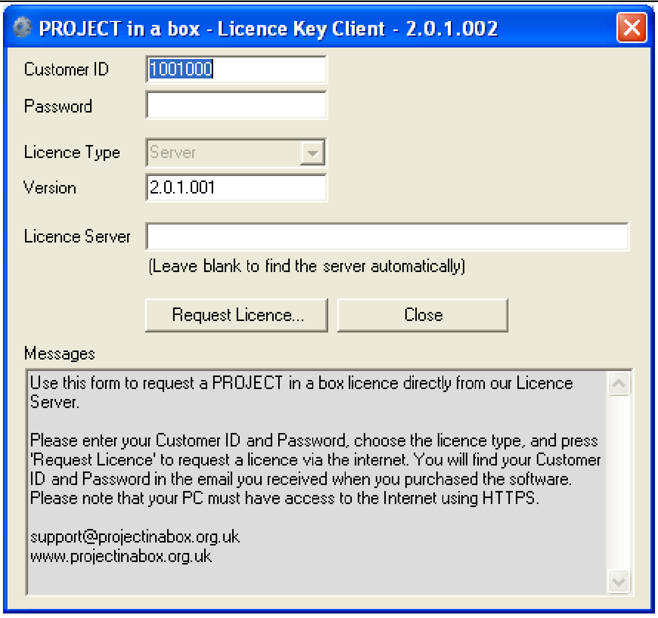
Licence keys may either be **unlocked** which can be used on any computer but only for a limited time period or **locked** which are specific to a particular computer but have no time limit on their operation. The normal mode of operation is with **locked** licence keys and this requires the user to provide a user key (generated from the computer and specific to that computer) and will then get a Lock Licence key in return.

Steps

1. The Client Licence form will show automatically if the Client does not have a valid licence, otherwise can be accessed from Main Menu – File - Licence
2. To licence your Server in an unlocked mode you need to enter your Customer ID and a currently valid Licence key, then press apply. If the unlock licence key is out of date the Licence Info box will be red and the reason will be listed.
3. To licence your Client in a locked mode:
   a. Take your **User key** and go to the PIAB website customer page (your system admin may do this for you)
   b. Paste/type your User key into the space in the 'Create Locked Licences' form under Version 2.0 licences. The system will not let you have a locked licence if you have already created one. If this is the case contact support for assistance.
   c. The new locked Licence key will now appear in the keys list above, Copy the Licence key which matches your User key, return to the Licence form and paste this into the Licence key area of the form. Check the customer ID is correct and press apply. Your form will then turn grey as shown below (left)

Screens





Notes

You can look at your Licence form any time to see what sort of key you are currently running.

If the licence directly via the internet option was set on your installer you will also have the Licence Key client present (above right), this is accessed from the Licence directly over the internet link in the Licence form and will get and apply the key for you by adding your account details. If using this approach read the instructions carefully and remember to press refresh on the Licence form and check the licence has taken before closing it.

Server Tool – Server log administration

Overview

Two key areas of the server have administration features in the Server tool, the purge of the /doc folder and the management of the server log.

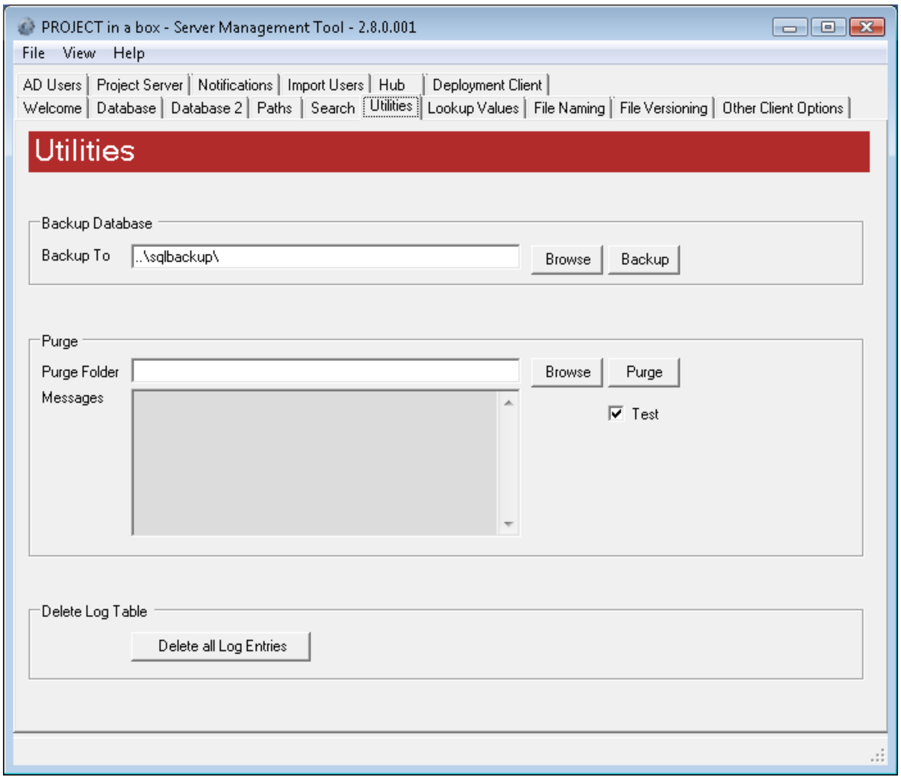
When projects or individual files and documents are deleted from the system the changes are made in the database but not in the \doc folder/document store itself in case of error and the actual files need to be recovered later. To keep the \doc folder tidy and minimise the volume of storage space associated with backing this up, files no longer referenced from the database can be 'purged' to a secondary storage folder this the user may decide to delete or back up less regularly.

The Server Log records the actions and requests from users for files or other actions, This information is the raw material for activity reporting and provides a more complete audit trail for the system including noting which users deleted files and when this was done. The log is actually stored in a table in the system database and can be viewed by an admin user (from a PIAB Manager client) but can be wiped/reset to empty in the Server tool if required.

Steps

1. Purge is located on the Utilities tab. The user is asked to define their purge folder and then completes the action by clicking the Purge now button.
2. The server log can also be wiped on the Utilities tab. A confirmation/warning dialogue is presented confirm OK to proceed or Cancel to stop the deletion of the log.

Screens



Notes

These are likely to be pretty infrequent actions.
The server log contains all the user activity data used in the project reporting, by clearing the log you would delete this valuable information which cannot be recovered.

Server Tool – Managing Lookups

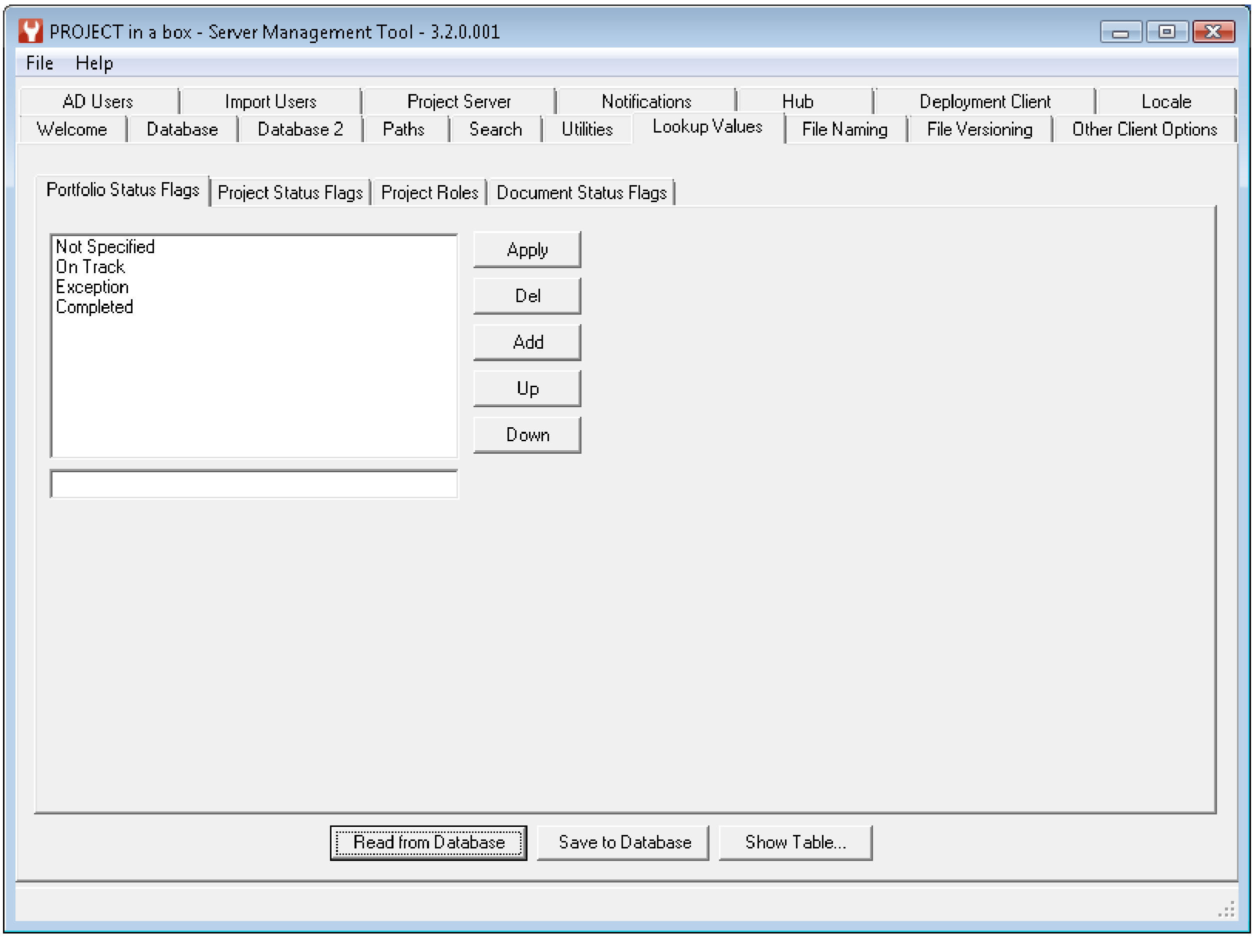
Overview

PIAB clients use three key sets of statuses those relating to Portfolios and projects, stages and those relating to documents as well as Project Roles. These are provided primarily from the Method Template for that project, if the Method template doesn't have any set then they will be taken from the default set on the server. These can be tailored on the server using the Server tool 'Lookup Values' tab to provide a closer match to the language used by the customer organisation.

Steps

1. Select which set of look up values you want to alter using the sub tabs
2. Use the Read from Database button at the bottom of the form to bring a copy of the current statuses back from the database and populate the form.
3. Then use each pane to alter the list for content and order.
4. When working on the Document status, first select a category, identify the minimum permission level which is required to access the category (on the File explorer form) then use the Document status values area to arrange the content of each category.
5. Once all changes are complete use the 'Save to Database' button to update the lookups and make them available to users.

Screens



Notes

Changing the Project and Stage status values may affect the RAG reporting used in Dashboard, Project and Portfolio reports and the .css files may need to be changed to provide colour references or .jpg files to match the new status values created.

Server Tool – Setting the Numbering and Naming Formats

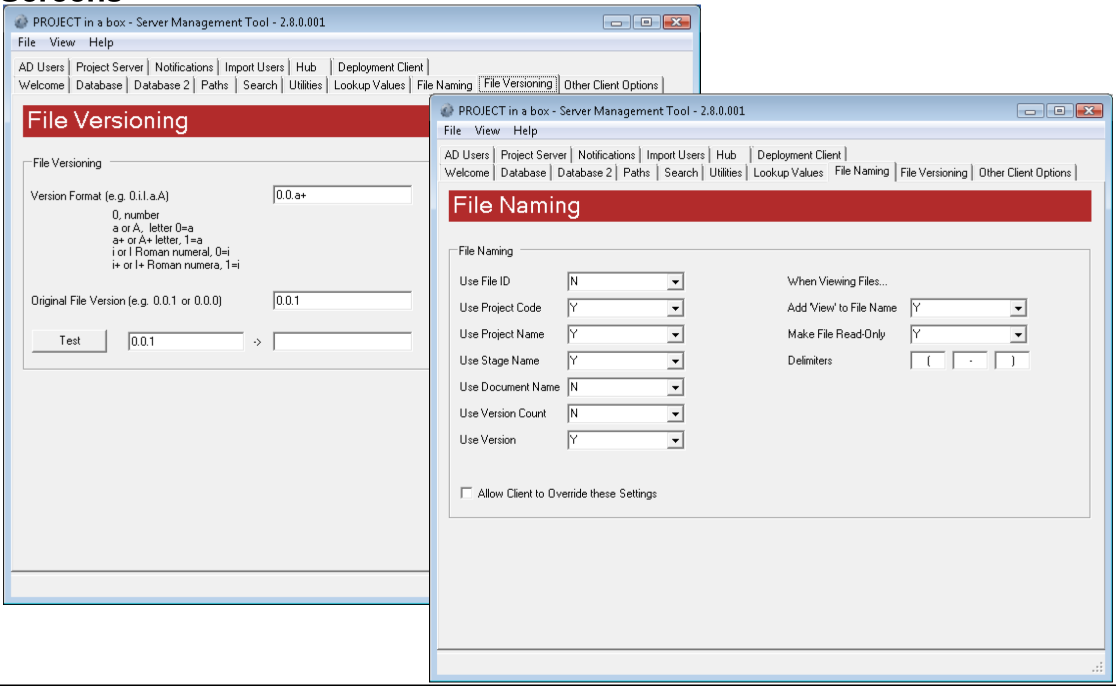
Overview

Numbering and naming conventions are set by the method template but if none are provided the project will instead inherit them from this server location. Using this form on the server tool an administrator defines the default numbering and naming formats that will be used on the server. When a project is created these will be inherited by the project unless the Method Template specified something different.

Steps

1. Use the File Versioning tab in Server tool:
    a. First set the Version format, i.e. the number of levels and whether each individual level will be a number a letter (upper and lower case) or a Roman Numeral (upper and lower case).
    b. Then set the original file version starting point
2. Use the File Naming tab in server tool:
    a. Select Y/N against each element to decide which will be included in the naming convention.
    b. Also set the delimiters to be used for dividing the elements.

Screens



Notes

It is worth setting these and then playing with them on a sandpit project to see the effects of the settings used before creating operational projects. Changes can be made to this at any point during the operational life of the server but changes may have odd effects on the Versions shown for existing project files, so it is better to get it right before you start.

The test feature enables you to see how a typical version code will be displayed which is very useful when dealing with roman numerals or alphas and using the + feature.

Server Tool – Active Directory Users

Overview

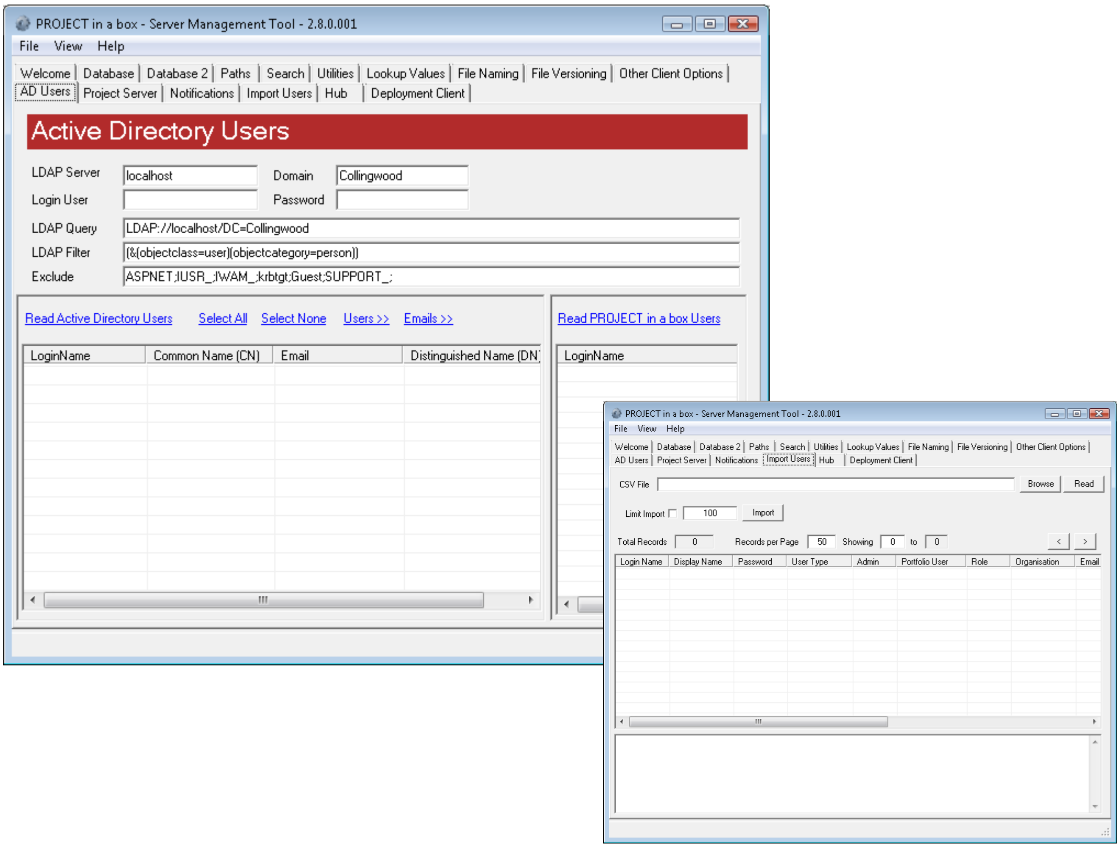
Organisations may already use Active Directory to manage all their user accounts and may want to use this source of information for populating PIAB with user accounts or email addresses.

The AD Users form in the Server Tool provides this capability allowing the current Active Directory list to be searched and a selected list of users and emails brought into PIAB. This action then creates new PIAB users where no matching name was found to support the use of AD Single Sign On as a client Authentication option.

Steps

1. Populate the LDAP server credentials, query and Filter fields and then use the 'Read Active Directory Users' link to populate the left hand side of the form.
2. Select the required user with a tick.
3. Use the Users and/or Emails links to transfer the selected data into PIAB.
4. This approach can be repeated periodically as required.

Screens



Notes

If you want to bulk upload users but don't have them stored in Active Directory you can instead upload from a data file with the Import Users feature.

Admin Tool – Other features

In addition to providing quick access to a backup and restore database capability the Admin tool also provides support in the following areas:

Managing the Indexing Service

The search tools in the PIAB client use the Windows Indexing service to index all the content from the Document store. The Indexing tab on Server Tool enables you to open the Management console and control the Indexing service directly (local help is provided on the management console). The PROJECT in a box Catalogue is called piabdoc.

Settings for Emailing Documents

A single tick box enables the administrator to inhibit or activate the ability of all users to checkout to email or ‘copy’ to email.

Force non-blank comment

This flag can be set on the Server Tool and requires all users to provide some comment when checking in a file or adding a new file.

File Paths

The main system file paths can be set for example to move the location of the Document store or to change the creation location for exported projects.

Project Server

This tab holds the connection details for the Microsoft Project Server instance which is related to the PIAB server, this information is used to establish contact into the server by the PIAB reporting engine when extracting data for reports.

Notifications and non Outlook email – SMTP settings

This tab stores the information used by the watches system when sending notifications out via SMTP. This is mainly watches but also supports Admin notifications. Further information is provided in the server help file.

Deployment Client
Provides a semi automated process for building the deployment clients which are then made available via the Enterprise Hub.

Enterprise Hub Settings
Provides a place to set up and manage the Enterprise Hub guest user account and forcing of IIS authentication by Enterprise Hub users. Also allows for sizing of navigation images and thumbnails used in the Enterprise Hub.

Installation and configuration support

Much of the functionality of the Server tool is associated with this installation and configuration of the system this is not covered here as it has extensive coverage in the specialist help file for the Server tool and also the software Install Guides.

Overview of Project Templates (2.0)

You can create your own project templates that include not only your own files but also your own project/stage structures and process diagrams. This section describes the format of the project templates for advanced users wished to modify templates beyond what is provided with our standard tools, and to troubleshoot modified templates that aren't behaving as expected.

What's in a Project Template?

The project template consists of a template folder containing a set of sub-folders and files as in the table below. The template folder must be the same as the ID of the template, "**ap2**" in this case. All the templates must be in one parent folder that PIAB can find. By default this is **Project in a Box Professional\template2.0**

The contents of the files and folder is as follows:

doc folder	Contains the template content files, e.g. MS Word documents, MS Excel spreadsheets, that are referred to in the project.xml and stage.xml structures.
image folder	Contains the images that are used to map the project process. Note these images must be **JPEG** files, with the extension **.jpg**
library folder	A folder of template files that can be used with this project template.
template.xml	An XML file containing general information about the project template e.g. ID, name, description. Also the set up to be used Aliasing, naming and numbering conventions, doc export properties, extended properties, reporting set up to be used etc.
menu.xml	An XML file describing the menus and the clickable areas on the images that lead to parts of the process.
project.xml	An XML file describing the structure of the project, its documents and files.
stage.xml	An XML file describing the structure of the stages in a project. (there may be multiples here)
library.xml	An XML file describing the template files in the **library** folder.

Using Method Manager

Method Manager is a separate tool designed for working on project Method Templates available for download from your customer account page.

Reference method templates for Version 3.4

The following standard method templates are available for version 3.3:

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Access P2 Method

- Light interpretation of PRINCE2-2009
- Ideal for single deliverable projects in low complexity environments
- Set up with templates and tools ready to exploit reporting and content autofill multi-user platforms in Office 2010 format.
- Custom content for reporting uses highlightcontent and Finances charts automatically

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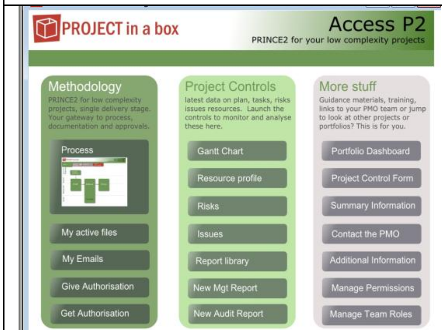

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Access P2 Method with Context

Exactly the same documents as AP2 above but set up to be permissions sensitive with team members given different navigation options to those offered to Modify users.

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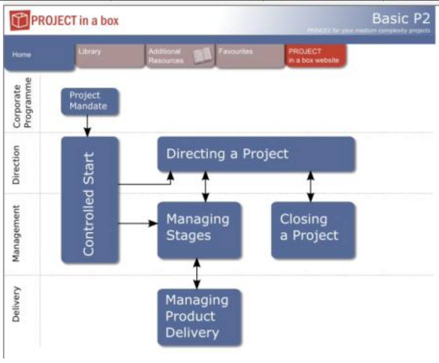

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Basic P2 Method

- Intermediate interpretation of PRINCE2-2009
- Ideal for projects in mid complexity environments where multiple deliverables require the use of stages
- Set up with templates and tools ready to exploit reporting and content autofill on multi-user platforms in office 2010 format.
- Custom content for reporting uses finance charts automatically

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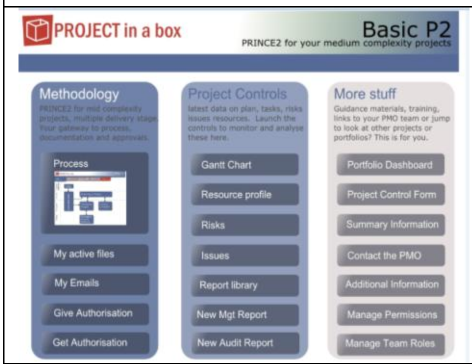

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Basic P2 Method with Context

Exactly the same documents as BP2 above but set up to be permissions sensitive with team members given different navigation options to those offered to Modify users

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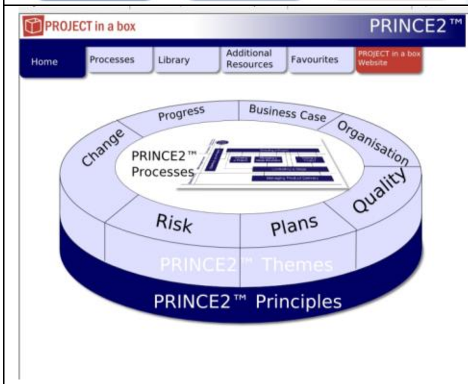

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PRINCE2 Method

- Complete PRINCE2-2009 as described in the Manual including the full set of official template files and additional content from the same author.
- Ideal to support PRINCE2 training and for delivering multi deliverable projects in complex environments
- Set up with templates and tools ready to exploit reporting and content autofill on and multi-user platforms, in Office 2010 format
- Custom content for reporting uses

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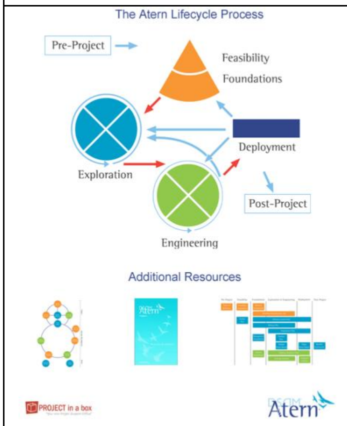
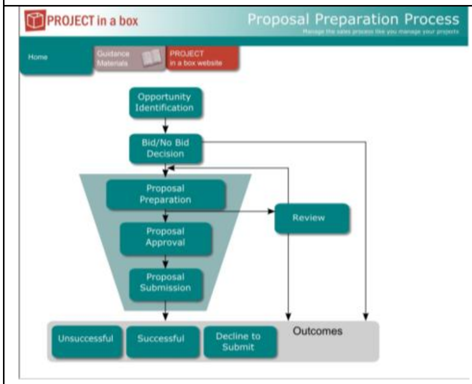
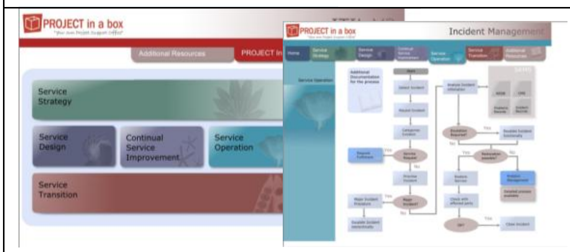
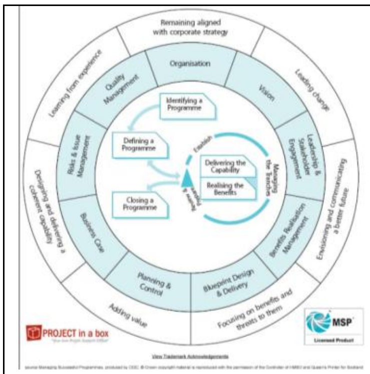
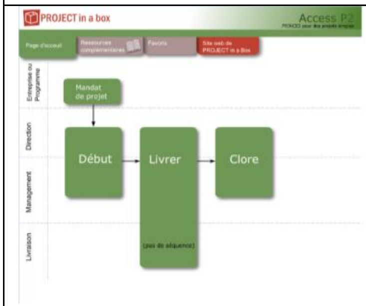
</table>

	finance charts automatically
	**DSDM Atern** • The official DSDM Atern methodology including the full set of official templates and some additional ones provided by PIAB. • Ideal for delivering agile projects in fast moving project environments or to support DSDM Atern training • Set up with templates and tools ready to exploit reporting and content autofill on Personal Edition and multi-user platforms, in Office 2010 format. • Custom content for reporting uses finance charts automatically
	**Proposal Preparation Process (PPP)** • Methodology to help you manage large proposals and tender responses like you might manage a project • Includes a full set of templates, tools and checklists • Set up with templates and tools ready to exploit reporting and content autofill on multi-user platforms, in Office 2010 format. • Custom content for reporting uses proposal budget data automatically
	**Lessons Learned Library (LLL)** • Lessons Learned Library method. • Create once per server and share in all the lessons related document from existing projects where it is then indexed for sharing. In Office 2010 format.
	**ITIL V3 Framework** • Interpretation of the ITIL v3 framework • Ideal for supporting ITIL learning to a Foundation examination standard or to manage an ITIL implementation in an operational environment • Provided with templates and guidance notes, in Office 2010 format. • **Optional Add on please check for details.**



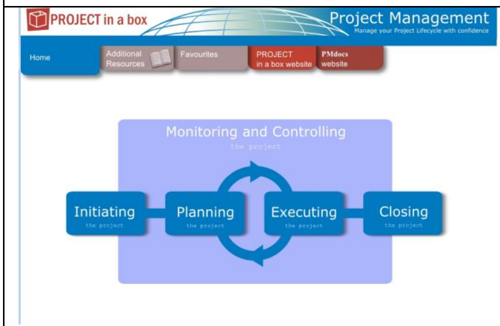
Managing Successful Programmes (MSP)

- The complete Managing Successful Programmes methodology provided as an Official licensed product.
- Ideal for supporting MSP learning/training and in delivering programmes in conjunction with the other project methods provided.
- Provides a full set of MSP templates and guidance material directly from the manual
- **Optional add on please check for details.**



Access P2-FR

- Light interpretation of PRINCE2-2009 translated into French
- Ideal for single deliverable projects in low complexity environments in French
- Set up with templates and tools ready to exploit reporting and content autofill on Personal Edition and multi-user platforms, in Office 2010 format.
- **Optional add on please check for details.**



Project Mgt Body of Knowledge

- PM framework in keeping with the PMBOK approach
- Low complexity projects single execution phase
- Set up with templates and tools ready to exploit reporting and content autofill on Personal Edition and multi-user platforms, in Office 2010 format.
- **Optional add on please check for details.**

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PROJECT in a box software is used by over 70,000 project managers in more than 150 countries worldwide.

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- Central Government
- Government Agencies
- Police and Fire services
- NHS Primary Care Trusts
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- Architects Practices

Our multi-user platforms are used by over 150 organisations in over twenty five countries including those based in Australia, Belgium, Canada, Denmark, Eire, Germany, Italy, Netherlands, Singapore, South Africa and the USA

PROJECT in a box
"Your own Project Support Office"

Prosis Solutions Limited
39 Plane Tree Way
Woodstock
Oxfordshire
OX20 1PE

Phone +44(0)1993 810425
Fax +44(0)1993 810425
Skype projectinabox
Email enquiries@projectinabox.org.uk
Web www.projectinabox.org.uk